USAREC Pamphlet 601-32

Recruiter and Station Commander

Army Recruiting Information Support System User's Manual

Headquarters
United States Army Recruiting Command
Fort Knox, Kentucky 40121-2726
1 May 2002

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Personnel Procurement

Recruiter and Station Commander
Army Recruiting Information Support System User's Manual

History. This issue publishes a new USAREC Pam 601-32.

Summary. This pamphlet is designed to assist recruiters and station commanders (SCs) with using the Army Recruiting Information Support System (ARISS) recruiter workstation (RWS) Leads-Reports application and the Top of System (TOS) Web site. It is not intended to replace any regulation but helps incorporate the applications in your day-to-day activities. Review the USAREC Reg 350 series and determine what manual processes are now automated with the Leads-Reports and TOS applications.

Applicability. This pamphlet is applicable to recruiting station (RS) level leadership of Regular Army (RA), United States Army Reserve (USAR), and civilian recruiting personnel actively on production utilizing any of the ARISS-RWS applications.

Proponent and exception authority. The proponent for this pamphlet is the Director of Recruiting Operations. The proponent has the authority to approve exceptions to this pamphlet that are consistent with controlling law and regulation. The proponent may delegate this approval authority, in writing, to a division chief within the proponent agency in the grade of lieutenant colonel or civilian equivalent.

Suggested improvements. Users are invited to send comments and suggested improvements on DA Form 2028 (Recommended Changes to Publications and Blank Forms) directly to HQ USAREC (RCRO-TS), Fort Knox, KY 40121-2726.

Distribution. Distribution of this pamphlet has been made in accordance with USAREC Pam 25-30, distribution Y.

For the Commander:

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Chapter 1

Introduction to ARISS

1-1. Background.

a. Life as a recruiter used to be easy, at least if you listen to the oldtimers. However, they did everything with pen and pencil, and they had mounds of paperwork that they and their applicants had to complete, often many times over. Due to errors, they often had to complete a document several times or use bottles of whiteout to cover their mistakes.

b. ARISS automates much of this process for you. If you have been in recruiting for any length of time, you may remember the Joint Optical Information Network System or applications called Recruiting Information Management System and Packet Projection. The Joint Optical Information Network System and these applications were the foundation of ARISS. Most of these old applications were stand-alone on a desktop or laptop, but never went any further than creating an enlistment packet or projecting an applicant's packet to the Military Entrance Processing Station (MEPS). It never allowed you to maintain data on your schools, compile the many paper lists that were used to track leads, always having to manually maintain reports, and your chain of command was always asking for information about what you were doing, sometimes two or three times each day! ARISS now does all of that and more for you.

1-2. Explanation of abbreviations. Abbreviations used in this pamphlet are explained in the glossary.

1-3. General.

a. ARISS is a tool to assist you with the recruiting process. The application can do many things, but it still takes you asking the question, "Johnny, do you want to start processing on Tuesday or Thursday?"

b. There is no need to read this manual from cover to cover, unless you just have some extra time. If that is the case, you are making mission with ease or just the opposite and you are not managing your time. There are some parts of the application you already do very well, while this manual will help you understand and master other areas of the application.

c. Basically, this manual will help you:

(1) Grasp the basics of ARISS and help you use the application to its fullest potential.

(2) Get the most out of ARISS by using all of the functions together. Here you will learn how to best tie each segment of the application to your prospecting and processing of applicants.

(3) Publish complete enlistment packets with the easy one-time data entry.

(4) Allow your chain of command to track production without interfering with your prospecting.

1-4. Using the manual.

a. As with anything new, there must be a transition for the new to come in and the old to be phased out. But where do you get the time to get a firm grasp of the application functions and implement them? We cannot answer that question for you. But we do know that you will need to take the initiative to implement ARISS. If you delay implementing ARISS, the more time and work you are going to spend to get caught up.

b. Throughout the manual, we have outlined a sequence to use to complete the different screens. In other cases, we discuss just how to complete screens. The way you use the application will depend, in part, on you and the applicant you are processing.

c. To make this manual easier to use, we have followed a few conventions.

(1) Anything you need to type or select appears in bold, like this:

Type **this entry**

(2) If there's any variable information to be typed, such as a key on the laptop keyboard or a file name, it appears in bold italics like this:

Type ***this entry***

d. In addition, you will find entries throughout the manual that will serve as reminders or notes along with known error messages that you may see if there is a problem.

(1) - This will identify reminders or additional notes that apply to that section.

(2) - This will show you error messages that may occur when using the application.

e. As part of a continuing effort to produce a manual of the highest quality, we would like to hear your comments. We really want you, as a user, to let us know what you like or dislike about this manual. You can e-mail your comments, ideas, or suggestions for improvement to ARISS Feedback from the Recruiting Central ARISS Web site. Although this manual will not provide all the technical support that you may need, there is an office that can. Contact the Service Oversight Center (SOC) at 1-(800)-223-3735, ext. 61700, and they will get you in contact with different support groups to resolve any technical problems or provide additional assistance.

Chapter 2

Get Started With ARISS

2-1. Requirements.

a. Whether you are a new recruiter, SC, or you are moving to another RS, there are some items that you need before you can use ARISS and its supporting applications. Your recruiting battalion (Rctg Bn) information management specialist (IMS) will provide you with most of these.

b. Of course you will need a laptop with a type 1 load. A type 1 load has the ARISS-RWS Leads-Reports application. Your Rctg Bn IMS will provide you with your NT login and password, Internet Service Provider (ISP) account with login identification (ID) and password, Public Key Infrastructure (PKI) disk with login ID and password, e-mail account, and load your ARISS-RWS database extract.

c. The NT login ID and password will be used to access your laptop, e-mail, and your ARISS-RWS Leads-Reports application. It would be a good idea to change your default password the first chance you get. Of course you may not have a choice.

d. Your ISP account will give you access to the Internet. You are only allowed 100 hours per month so make sure you disconnect your ISP when not online or replicating. When your Rctg Bn IMS receives your account information, they will set up your dial-up networking on your laptop. Remember to use your ISP for official business only.

e. The PKI disk is your key to getting access through all of the firewalls within the United States Army Recruiting Command (USAREC). It is used in conjunction with your ISP and ensures the data you are transmitting is secure. Just like your NT and ISP passwords, your PKI disk and password should be treated like a credit card and should not be loaned to anyone and no one should know your password.

f. An e-mail account will be created for you, but will use your NT login ID and password. Remember to check right after you replicate in the morning and afternoon.

g. This leaves the last item, which is your ARISS-RWS database extract. If you are a new recruiter or SC there are certain events that must take place to ensure your Leads-Reports application is ready to use. Your Rctg Bn IMS will need to add you in the system along with your specific role. This will generate a database extract for you. This database extract is the key to working with the Leads-Reports application. Once the database extract is loaded, you will need to replicate so the system can recognize you.

(1) If you are a recruiter, your SC will access the TOS and assign you ZIP Codes and schools. This is the foundation for you receiving new leads. Additionally, the SC may reassign records to you that were being worked by an old recruiter.

(2) If you are the SC, you will need to access the Leads-Reports application and ensure there are no unassigned records. You will want to review the TOS to ensure all of the RS's ZIP Codes and schools are assigned properly to your recruiters.

h. For departing recruiters, your SC should reassign your records, ZIP Codes, and schools prior to your departure. This will ensure a smooth transition in the processing cycle for those records you are working. Upon your departure your database extract will be terminated.

(1) If you are a recruiter, your SC should reassign your records prior to your departure. If for some reason that does not happen, those records, ZIP Codes, and schools are not lost, but will be shown as unassigned on the SC's ARISS-RWS Leads-Reports application.

(2) As the SC, if you find unassigned records you will need to reassign them back to either a recruiter already on board or the new or incoming recruiter. For departing SCs, you can reassign your records to another recruiter or just let the Rctg Bn IMS terminate your extract. The new SC will reassign those records from unassigned.

i. When you review this manual you will notice that some chapters are specific to the SC. Even though the other chapters are general in nature, recruiters and SCs should be familiar with all functions.

j. There may be other items that you will be issued, but this should be all you need to use the ARISS-RWS Leads-Reports application and access the TOS. So what are you waiting for? Get started.

Chapter 3

How to Logon

3-1. General.

a. To ensure you have accurate information in the Leads-Reports application and/or the TOS, you must logon properly and create a secure connection with your ISP. The following steps will demonstrate the process for connecting to your ISP and creating a secure tunnel through PERMIT/Client. Once connected you may replicate with Leads-Reports, review different actions and reports on the TOS, and check your e-mail.

b. There are three steps to establishing the connectivity and replicating. They are:

(1) Connect to the network.

(2) Establish a secure connection.

(3) Extended authentication.

c. You will need:

(1) Your NT user ID and password.

(2) Your PKI disk.

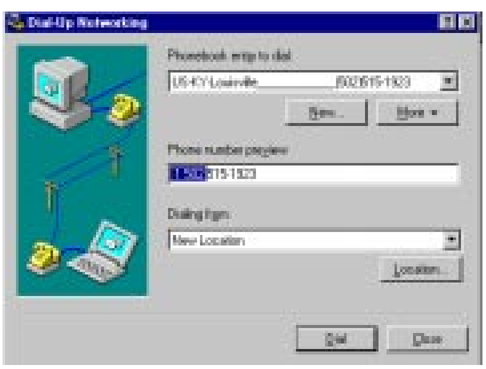
(3) Your PKI password.

(4) Your ISP user ID and password.

✔ If you do not have any of these, contact your Rctg Bn IMS.

3-2. Connect to the network.

a. After successfully logging on your laptop with your NT logon ID and password you are now ready to get connected. You first need to connect to your ISP. You must have your computer connected to a telephone line to dial-in and then click the **Dial-Up Networking** icon on your desktop.



b. You will need to select the local area from the **Phonebook entry to dial** drop-down arrow. It starts by country, then state, and then city. Make sure that the entry you select is not a long distance call. If there is no listing under the drop-down arrow for your area, contact your Rctg Bn IMS to determine what number you should use. You will need to delete the prefix and area code to make it a local number. Click the **Dial** button.

c. Your ISP user ID and password will be provided by your Rctg Bn IMS. You will need to enter your ISP **User name** and **Password.** Your user name will always start with **internet.gv111.________.** Now you need to enter your ***Password***. Your password is case sensitive and is assigned to you and is only used for connecting to your ISP. Notice that the password is entered as asterisks.

d. You do not need to fill in the **Domain** window, so click **OK**.

✔Notice that you cannot save your password for later use.

e. You 

are now connecting to your ISP.

f. The system will verify your user name and password. 

g. The system then registers your computer on the network and you will get a message stating that you are connected.

h. If you get an error message try to resolve by doing the following:

(1) Error 5. Make sure the user name and password are entered correctly and remember that it is case sensitive. Make sure you have nothing entered in the Domain field. If you continue to get the error your account may be locked. Contact your Rctg Bn IMS or the SOC for further assistance.

(2) Error 633. This usually means that you didn't hang up from the previous connection. Right mouse click on the ISP icon and select hang up.

(3) Error 678 or 692. Make sure the user has the correct telephone number to dial the ISP.

(4) Error 718. Make sure the Domain field is blank. If there is anything in the Domain field the connection will not be made.

(5) Error 734. Right mouse click on the ISP icon and select Edit Entry and Modem Settings. Next select the Security Tab and on the tab, select **Accept Any Authentication Including Clear Text,** and hit **OK** to save changes.

3-3. Establish a secure connection.

a. To get a secure connection, an application called PERMIT/Client was installed. This application creates a secure connection through your local ISP to ensure the information you are transmitting or receiving cannot be seen by unauthorized users. You must have a secure connection to replicate, send projections, and view reports through the TOS. This secure connection is also required to access your USAREC e-mail account and the USAREC Intranet.

"WARNING" WHEN YOU RECEIVED YOUR PKI DISK YOU SIGNED A DOCUMENT THAT STATED THAT YOU **WOULD** PROTECT YOUR PKI DISK AND NOT SHARE IT. DO **NOT** SHARE YOUR PKI DISK. DO NOT LOAN YOUR PKI DISK TO ANYONE. TREAT YOUR PKI DISK AS IF IT WERE ***YOUR PERSONAL CREDIT CARD!*** THE PKI IS **YOUR** "SIGNATURE." IT IS YOUR IDENTITY. IF AN INAPPROPRIATE ACTION IS DONE ON THE SYSTEM OR ON THE INTERNET, IT WILL BE ATTRIBUTED BACK TO **YOU!**

b. Once this connection message box has disappeared, you need to position your mouse pointer over the task bar at the bottom of your screen. If your task bar is hidden, position your mouse at the bottom of your screen and the bar should appear.

c. Notice the two icons highlighted in the system tray of the task bar. Once you are connected to the ISP, you will see the icon on the right that looks like a small telephone. Sometimes this icon may be flashing blue in the background. The icon flashes blue to indicate that a connection has been made and that you are receiving data. The icon on the left is the PERMIT/Client icon.

d. Normally the PERMIT/Client icon will be showing a red T with a strikeout symbol. This is showing that the application is currently disabled. To create a secure connection you will be required to enable the application and login. In order to accomplish this you will need to get to the **PERMIT/Client** main menu. Right click on the **PERMIT/Client** icon to show the main menu.

e. This is the **PERMIT/Client** menu. Notice the green highlighted area. This identifies the location for your connection. The Tier your computer will go through depends on where you are located. As a user, you should not change this setting. If you do change it, you will not receive a valid connection.

f. If there is a checkmark by **Disable**, click on **Disable** one time to enable this program. If there is no checkmark the application is already enabled and you should go to the next step.

g. Now you need to login. Note that the strikeout symbol is gone and the **PERMIT/Client** icon is now enabled.

h. Right click on the **PERMIT/Client** icon. Click **Login User**.

i. Before selecting the **Browse** button, you must insert your PKI disk. A PKI disk should have been issued to you by your Rctg Bn IMS. You can use your PKI disk to access only your information. Your PKI disk and password should be treated like a credit card. No one should know your password. Click **Browse**.

✓ Do not share your PKI disk.

j. Click on your ID certificate. The certificate should now show in the file name field. Click **OK**. Do not use your e-mail certificate. You cannot replicate successfully using this certificate. You may need to change the drive from C: to A: before you can find the certificate.

k. Enter your PKI password. Again, notice that the password is encoded as asterisks. Click **OK**. The system will now create a secure tunnel for you.

✓ If you lose your PKI disk or forget your logon ID or password contact your Rctg Bn IMS immediately.

3-4. Extended authentication.

a. The Extended Authentication window opens when you have to verify the computer's login information. It will open with the **UserID** filled in based on the NT logon. Enter your ***Password***. This password is the same password as your NT logon password. Click **OK.**

b. The system will then ask you to wait while it authenticates and creates a Subnet. You do not need to click **OK** because the system will automatically forward.

c. Once you are authenticated and a secure connection has been made, the green T will show a lock symbol around it.

d. If there is a problem getting this secure connection, you may need to try Reload Policy under the **PERMIT/Client** menu. This is only necessary if after a few minutes you do not get a secure connection. This will search another path for you to get a secure connection. To do this task, right click on the **PERMIT/Client** icon and then click on **Reload Policy.** In most cases this will establish a secure connection. If you still cannot get a secure connection, check to ensure you are still connected to your ISP. You may need to start the process over again before you can get a secure connection.

✓ Remember that you cannot complete replication without a secure connection.

e. The Asset Management Agent program will run the first time you dial-in. It does this each time you restart your computer. It will check your hard drive to ensure all required programs and files are installed. It will also check for and report any unauthorized programs that you have installed to your System Administrator. There is no problem with using your laptop while Asset Management Option (AMO) is running; however, using applications that require the network (i.e., Replication, e-mail, or Internet) may cause these applications to run slower due to the amount of resources being used by AMO. Normally, AMO will take around 1 to 3 minutes to run and should be allowed to complete its operation prior to using other applications that would use the network.

✓ Remember, once you have completed all your actions that require a connection to your ISP, you need to disconnect and disable your **PERMIT/Client** application and ISP connection. You only have so many hours per month, do not waste them being connected needlessly.

Chapter 4

Perform Replication

4-1. General. Replication is one of the most important tasks that you have to do on a daily basis. It allows the data on your laptop to be backed up in case your computer fails. When you replicate you also receive new leads and at the same time the records currently on your laptop are updated with new information from the MEPS such as test scores, physical data, and enlistment information. It also provides data to the TOS server that allows users to pull reports.

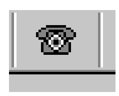
4-2. Replication.

a. To replicate you will need to be connected to your ISP and have a secure connection before continuing with replication (see chap 3 if you need assistance).

b. Once you have a secure connection you will need to open **Leads-Reports**. Click the **Leads-Reports** icon on your desktop.

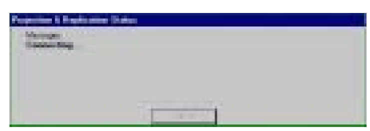
c. The system will default with the User Id filled in. Enter your ***password*** and click **OK**. Do not try to open any programs or close this application until the data loads. This process can take a few minutes. Once the application opens, you are going to go through the process of **Replication**.

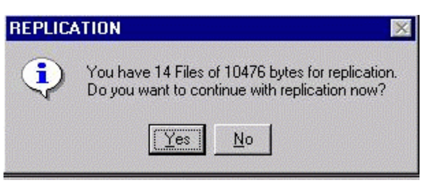
d. You can replicate by clicking on **File** from the menu bar and then clicking on **Replicate/Project** or just click on the **Telephone** icon.



e. From this screen you can either replicate and project or replicate only. Depending on what you are doing, click on the **Project & Replicate** button or the **Replicate Only** button. Since we only need to replicate at this time, click that button.

f. The replication status will take a few moments to connect.



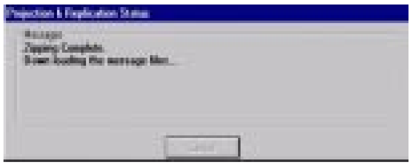


g. You will receive a message stating you have x-number of files to receive. To continue with the download, click **Yes**.

✓ If there is a large amount of data, your computer might be downloading information for an extended period of time. You may want to select **No** and wait until you have more time available for the download. But you need to complete the download as soon as possible as there will always be files to receive.

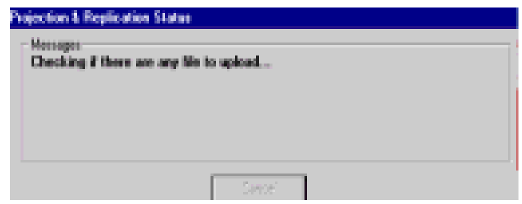
✓ If you receive an error message during replication, wait 15 minutes and try again. If this continues contact you Rctg Bn IMS for assistance.

h. First the program will zip up the message files.



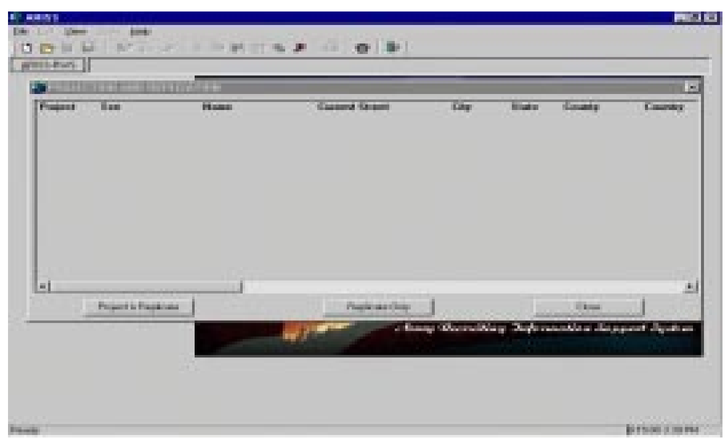
i. Once that is complete, the messages will be downloaded.

j. Then the program will check if there are any files to upload from your system into the main database. This could be any change that you made to any record on your database. The program will automatically upload these files from your system. The program will also automatically check for errors and then logout.



k. If you had any messages, you could print them from this screen. A message would state **Projection passed** or **failed** edits. These messages will show on your screen for 7 days and then disappear. Click **OK**.

l. Now exit the **Projection & Replication** screen by clicking **Close**. Closing the program will bring you to the main **ARISS** screen. You can minimize the **ARISS** application and check your e-mail or browse the web. To disconnect follow the above steps in reverse order. Log yourself off **PERMIT/Client** and then **Disable**. Go to your **Dial-Up Networking** and hang up.



✓ Remember, once you have completed all your actions that require a connection to your ISP, you need to disconnect and disable your **PERMIT/Client** application and ISP connection. You only have so many hours per month, do not waste them being connected needlessly.

Chapter 5

Use the Find Screen

5-1. General.

a. The Find screen is an easy and quick tool to navigate in your leads database. For example, the Find screen is helpful in organizing your schedule. It will show your current and past appointments, search for specific records, and locate specific groups of records that you may want to contact that day. This will get you comfortable with using the Find screen to increase your productivity.

b. The following steps will show how to use the Find screen.

(1) Open the Find screen.

(2) Understand the information provided.

(3) Set search parameters.

(4) Open a record.

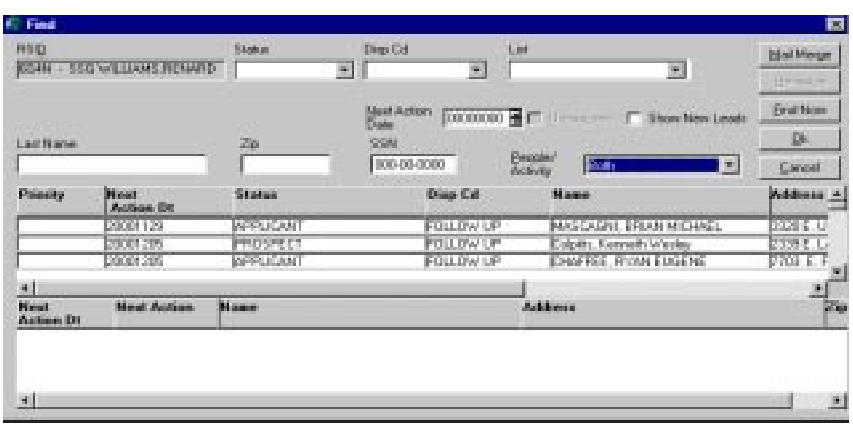
5-2. Open the Find screen.

a. Knowing how to use the Find screen will help you quickly locate specific records, groups of records, and manage your daily appointments and activities. Click **Open** under the **File** menu or just click on the **Open Folder** icon on the toolbar.

b. If there are no scheduled activities, this message box will open. Scheduled activities can include any activity scheduled with your assigned schools. Click **OK**.

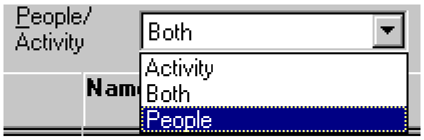
5-3. Understand the information provided.

a. Once the **Find** screen appears it will display all records that have a **Next Action Date** of today or of a previous date. This screen will not display all records that are currently assigned to you. If you are aggressively working your records, this will display your appointments or actions that you need to complete today.



b. Let's review the **Find** screen for a few moments to ensure you understand its capabilities. This screen will allow you to find any record or group of records that you are looking for. Understanding how to use this screen will allow you to quickly find the records that you need to work. If there is a drop-down arrow in the field, there are items provided for you to select. This is not a free text field. If there is no drop-down arrow, then this is a free text field. The column headers will allow you to sort the records by the column, either in ascending or descending order; however, if there is a blank field in that column, it will always show at the beginning. To look at all records that are assigned to you, click on **Find Now**.

5-4. Set search parameters.

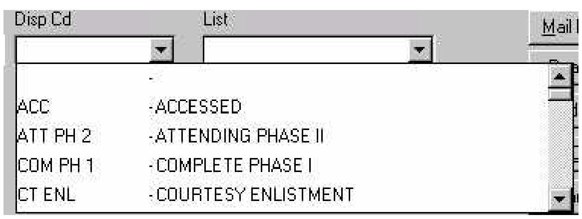


a. The **People/Activity** window will display people and activities that are scheduled, if **Both** is showing in the display window. If you are looking for people only and are not looking for any activities, you can show more records by selecting **People** from the **People/ Activity** window. If you select **Activity,** it will only display your scheduled activities for your assigned schools. Make your selection and click **Find Now** to display your records. Now you can begin to locate records by using **Status**. Click the **Status** window drop-down arrow. Let's take a look at the options you can select for Status. Using the applicant's status to narrow down your search is a very efficient way to locate specific records. Look at the different status choices available for you to select. Once you determine what status of records you want to search for, select that status and click **Find Now** to start the search. All records meeting the criteria that you selected will be displayed.

✓Remember that performing Status searches is a quick and effective way of finding records. In fact, searching by Status, Disp Cd, or List will provide you with the fastest results.

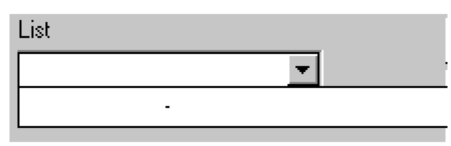
b. Now if you want to use only the **Disp Cd** to search, you must make sure you clear the **Status** window first. Begin by clicking the **Status** window drop-down arrow. Now click the first selection, which is a blank line.

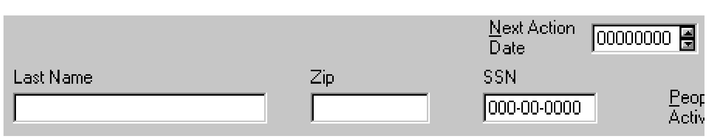
✓Remember this process applies whenever you want to change any of your search parameters.



c. Now that you've cleared the **Status** window, you may begin a search by Disposition Code. Start by clicking the **Disp Cd** drop-down arrow. Take a look at the options you have under the **Disp Cd** menu. Click the **Disp Cd** scroll bar down arrow. Once you have determined what disposition code that you want to search by, click **Find Now** to get the results of your query. To clear your search on disposition codes, click the **Disp Cd** drop-down arrow and click the first selection, which is a blank line.

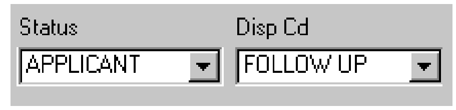
d. You may use the **Find** screen **List** parameter to search lists that you made and stored as a **Create List**. If you have not created or saved a **Create List**, we will discuss this in another chapter. If you have saved a **Create List** it will be displayed in the drop-down window.





e. You can also search by the **Next Action Date**. This can help you organize your schedule in advance. If you're looking for a specific individual, you can type the last name or a portion of the last name into the **Last Name** window to display that specific name or all names that start with the letters that you entered. Or suppose you need to search for all the individuals in a specific ZIP Code area, you can put any portion of the

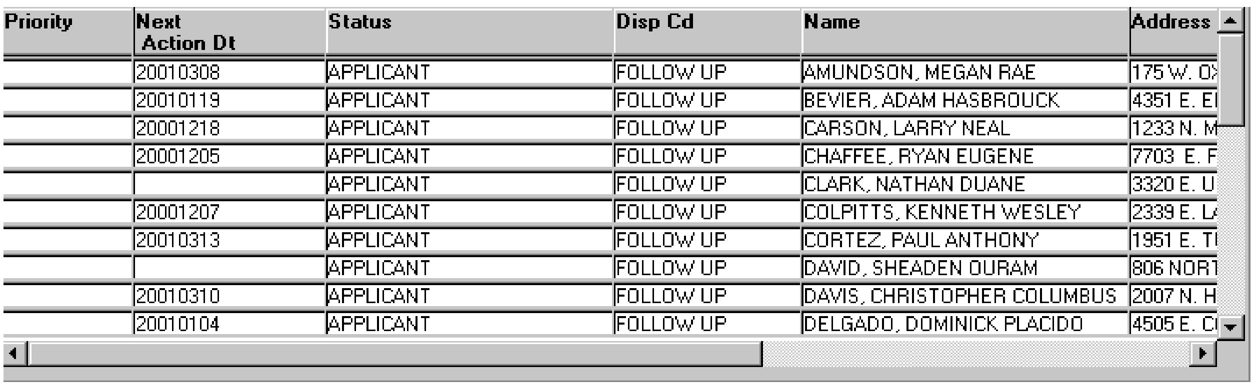
ZIP Code in the **Zip** window. You can also search by an individual's social security number (SSN).



f. To find records using multiple parameters enter your criteria from the different drop-down arrows and click **Find Now**. For example, if you want to find all records with a **Status** of **APPLICANT** and a **Disp Cd** of **FOLLOW UP**. To find these records click the **Status** window drop-down arrow and click on **PROSPECT**. Now you'll select a second parameter. Click the **Disp Cd** drop-down arrow and select **FOLLOW UP**. You will need to scroll down the disposition code menu to find follow up. Take a few minutes and review all of the disposition codes that you can use.

g. Now click **Find Now**. 

h. Your query results will be displayed. Remember that clicking on the column headers will sort the records in ascending or descending order.



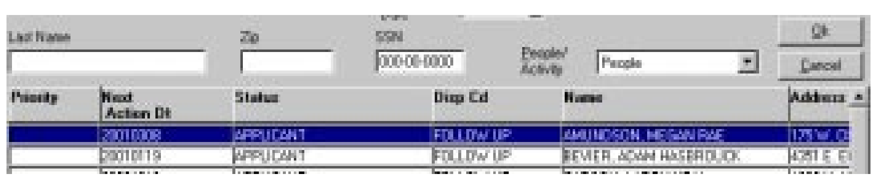
Priority	Next Action Dt	Status	Disp Cd	Name	Address
	20010308	APPLICANT	FOLLOW UP	AMUNDSON, MEGAN RAE	175 W. O
	20010119	APPLICANT	FOLLOW UP	BEVIER, ADAM HASBROUCK	4351 E. E
	20001218	APPLICANT	FOLLOW UP	CARSON, LARRY NEAL	1233 N. M
	20001205	APPLICANT	FOLLOW UP	CHAFFEE, RYAN EUGENE	7703 E. F
		APPLICANT	FOLLOW UP	CLARK, NATHAN DUANE	3320 E. U
	20001207	APPLICANT	FOLLOW UP	COLPITTS, KENNETH WESLEY	2339 E. L
	20010313	APPLICANT	FOLLOW UP	CORTEZ, PAUL ANTHONY	1951 E. T
		APPLICANT	FOLLOW UP	DAVID, SHEADEN OURAM	806 NORT
	20010310	APPLICANT	FOLLOW UP	DAVIS, CHRISTOPHER COLUMBUS	2007 N. H
	20010104	APPLICANT	FOLLOW UP	DELGADO, DOMINICK PLACIDO	4505 E. C

i. Take some time and enter different parameters in the search fields to display your records. The more familiar you are with the **Find** screen, the quicker you will find the records that you are looking for.

j. One of the new features of the **Find** screen is the check box to find new leads. Check the **Show New Leads** and then click **Find Now** to display any new leads that you have received since your last replication. These records will only show until your next replication. Check this routinely to find those new leads.

5-5. Open a record.

a. If you want to work a record, click on the record once to highlight that record and then click **Ok**. It will bring you to either the **Lead** screen or **Prospect** screen depending on the status of the record you are working.



b. If you just need to exit the **Find** screen, there are two ways. The first is by clicking the **Close** button or you can close the **Find** screen by clicking the **Cancel** button.

c. One item that we did not discuss is the **Mail Merge** function on the **Find** screen. This will be discussed in chapter 18. You will also notice that there are two items that are grayed out, the **Unassigned** box and the **Reassign** button. These are only available for your SC.

d. When you close the **Find** screen you'll be returned to the ARISS-RWS Leads-Reports main screen.

Chapter 6

Maintain Contact History

6-1. General.

a. Before we get too far in annotating information on the lead or other screens, we need to take a few minutes to understand what your ARISS-RWS Leads-Reports application will do for you. Think of your laptop and the ARISS-RWS Leads-Reports application as taking your prospect data records, appointment mandex, the different paper-based leads lists, schools folders, etc., and putting them all in one location. That is what the ARISS-RWS Leads-Reports application does. Using the laptop, you will automatically receive leads through the replication process, annotate your appointments, record the results of your appointments, schedule future appointments, and maintain all your school information. Instead of searching your desk drawers for the different documents, everything you need is now on your laptop.

b. Now let's talk about the records that you will see in the ARISS-RWS Leads-Reports application. Most records that you will receive through replication will be leads. There are several sources that will provide leads electronically to you. The challenge that you face is: How do you manage so many lead records? This will require you to be aggressive in contacting the leads that are provided and annotating your actions on each record. Sound difficult? It isn't if you understand the application. So let's get started. You already know how to Replicate and should understand how to use the Find screen, so now let's start working those new lead records that you received.

c. The following steps will show how to use the Contact History:

(1) Open the Find screen and select a record.

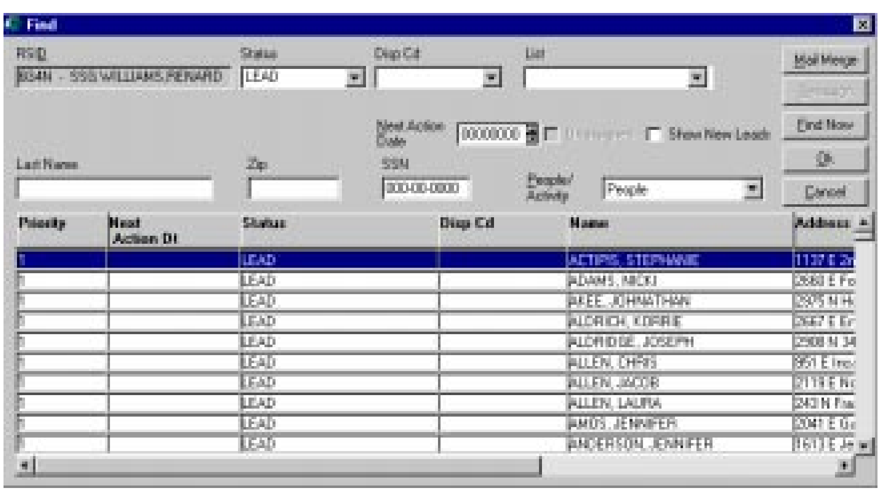
(2) Access the Contact History screen.

(3) Record your contact actions.

(4) Change record status.

6-2. Open the Find screen and select a record.

a. Access the **Find** screen by clicking **Open** under the **File** menu. Sometimes you'll receive a **"No scheduled activities**" message. This means that there are no school activities or functions planned for your assigned schools. The first thing you see are records that need followup. We will assume that you have completed your followup actions and you want to start working your leads.

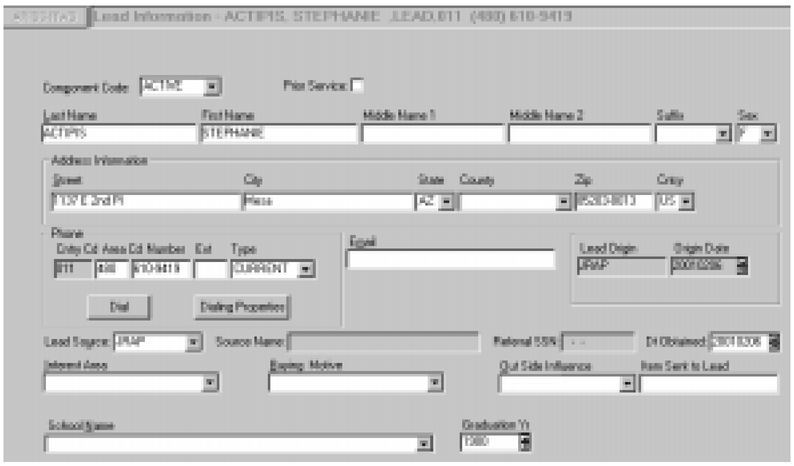


b. Since you want to review the records that are classified as "Leads," go ahead and click **LEAD** from the **Status** drop-down arrow. Change your **People/Activity** window to **People** and click the **Find Now** button to obtain individuals classified as leads.

✔ Remember you can sort the records in ascending or descending order by clicking on the column headers. In this case they are sorted by name.

c. Ever wonder what that priority code 1 or 2 stands for? Priority code of 1 are those leads received from USAREC Advertising, Joint Recruiting Advertising Program, Student Armed Services Vocational Aptitude Battery (SASVAB), and Total Army Personnel Database - Active Enlisted. Priority 2 leads are Total Army Personnel Database - Reserve and Defense Manpower Data Center leads. → change this to what it will be. These codes will change in the near future and each lead source will have its own priority code. This will make it easier to determine where the lead came from. ← no? it will make it easier to access important leads, yes?

d. Highlight the lead you want to contact and then click **Ok**. This will bring you to the **Lead Information** screen. This is probably the most misunderstood screen in the ARISS-RWS Leads-Reports application. Knowing how to effectively use this screen will make your job easier. Think of your Lead Information screen as a new prospect data record that you just received. But now you are annotating the information on your **Lead Information** screen and later in your Contact History screen. Being able to accomplish this will help you keep interested individuals at the forefront of your recruiting endeavors and to record information that you gather when you speak with an interested individual. Let's take a look at the **Lead Information** screen.

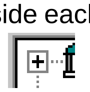


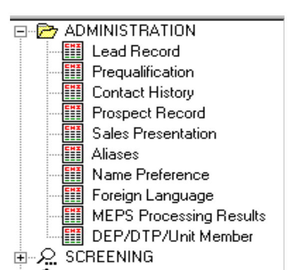
e. A lead record is nothing more than information about a possible applicant. Notice most of this example record is complete, but there will be records that will have information missing. Notice that the ARISS-RWS tab is grayed out and that no other screens are available. The reason is because the **Lead Source** is blank. You must select the **Lead Source** before you can go any further. The drop-down arrow will identify one or more different lead sources that you can select. Click on the drop-down arrow and select the lead source.

f. Review the other information fields on this screen. You'll be contacting this person, so pay close attention to the Interest Area and Buying Motive boxes and if the lead has any Outside Influences, as those will help you to establish rapport with him or her. Click the drop-down arrows and familiarize yourself with the available items.

g. You must save the information on the screen before you can go any further. You can save the information by clicking on **File** and then on **Save** or just click on the **Save** icon.  Once you save the record, the ARISS-RWS tab is now available.

6-3. Access the Contact History screen.

a. Click the **ARISS-RWS** tab to open the application tree to see the functions that are available. You need to become familiar with what screens are available under each tree item. The icon beside each title identifies additional screens that are hidden. Click on the **plus sign**  to display the other available screens. Click on **ADMINISTRATION** and you will see the 10 additional screens that are now available. The one screen that you need to understand is Contact History. Just as you recorded all your actions on the prospect data record, you will now record your actions on the **Contact History** screen. Now click the **Contact History** selection on the menu tree.



b. Notice that the **Contact History** screen does not show any personal information. This screen is only used to record your daily actions that you conducted for this individual. However, the individual's name and telephone number is always displayed at the top of the screen.

c. Before we go further, we need to define what the different statuses are and when to change the status. If you have a question about what the **Status** should be, the information below will help you determine what status to select and at what juncture of processing:

(1) **LEAD:** This is nothing more than a name, telephone number, and/or address of a potential candidate that you will need to contact and determine his or her interests and qualifications to join the Army. The candidate will remain a Lead until they agree to an initial appointment.

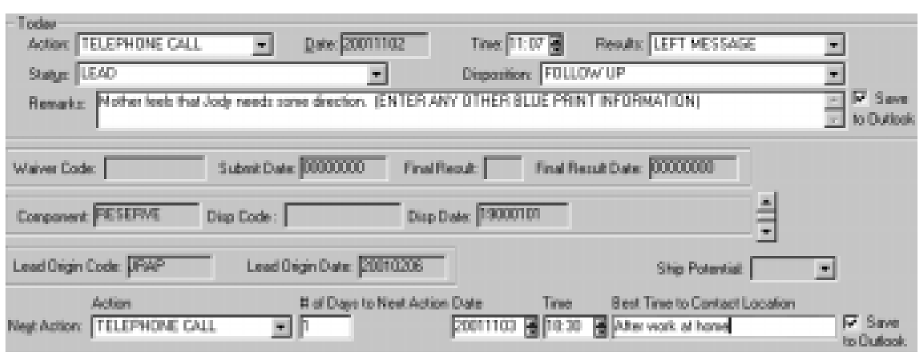
(2) **PROSPECT:** You have contacted this individual and agreed to discuss the programs and options that the Army can provide. He or she has agreed to an initial appointment to discuss these items, but has not agreed to process.

(3) **APPLICANT:** This individual has agreed to start processing for enlistment into the Army. He or she has agreed to test or physical. Remember if he or she agrees to process on their initial appointment, show that in the **ACTION** field.

6-4. Record your contact actions.

a. During your scheduled telephone prospecting, you tried to contact Jody and left a message with the mother. She informed you that Jody would be back tomorrow evening around 1830. She feels that Jody needs some direction in life and should discuss the options that the Army can provide. Now it is time to record your actions in the **Today**'s box. Notice that there is a check box to **Save to Outlook**. By checking this box, the information that you enter in the **Today** fields will be posted to your Outlook calendar. If your calendar is not set up, review chapter 31 on how to set up and use your calendar.

b. Since you were not able to talk with Jody, the **Status** will remain as a **LEAD**, but you want to record that you did make the call. Click the **Action** drop-down arrow and select **TELEPHONE CALL**. Click the **Results** drop-down arrow and select **LEFT MESSAGE**. Since you were successful in making contact with the mother, click on the **Disposition** drop-down arrow and annotate **FOLLOW UP**. You can annotate that you talked to the mother and any other blueprint information in the **Remarks** field. Before you click on **Save**, you want to record your next action. In **Next Action** click on the drop-down arrow and select **TELEPHONE CALL**. You can enter the **# of Days to Next Action Date** and click on the ***Tab*** key and it will change the date or just enter the new date in the **Date** field. Since the mother stated Jody would be home at 1830, enter that time in the **Time** field. If you want to enter the **Best Time to Contact Location**, type ***Home***

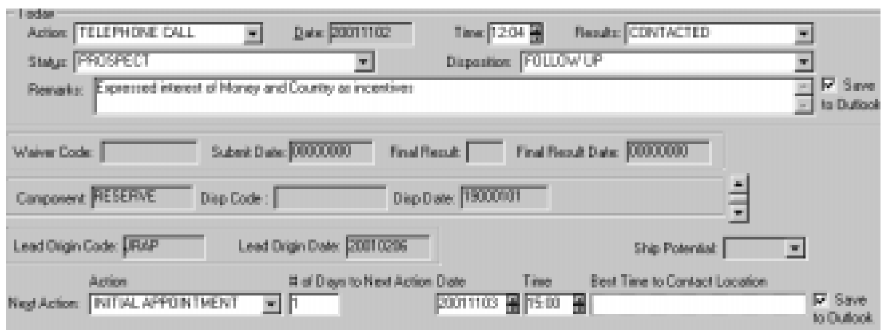


in that field. Again, checking the **Save to Outlook** boxes in the **Today** and **Next Action** fields, those actions will be posted to your Microsoft (MS) Outlook calendar.

c. Now click **Save.** The information that you just entered is now in the **History** box. When you replicate, your SC, first sergeant (1SG), and recruiting company (Rctg Co) commander will be able to see that you made this call.

d. Now, instead of talking to the mother you were successful in talking with Jody and he agreed to an appointment. Jody expressed an interest in hearing more about the military and you identified that two of his interests are money and service to country. Jody agreed to come into the office tomorrow at 1500.

6-5. Change record status.



a. Since Jody agreed to an appointment, he is no longer classified as a lead. The first thing that you have to do is change the **Status** to **PROSPECT**. Then you would select **TELEPHONE CALL** from **Action,** select **CONTACTED** from **Results**, and **FOLLOW UP** in **Disposition**. Summarize your conversation in the **Remarks** field. Don't forget you need to record your **Next Action** information. Since this will be your first appointment, select **INITIAL APPOINTMENT** in the **Next Action** field and record the **Date, Time**, and **Best Time to Contact Location** of the initial appointment. If you notice, there is nowhere to record Jody's interests on this screen except in the **Remarks** field. However, there is a screen where you can record this information and that is on the **Lead Information** screen that you just came from. Now it's time to save all your hard work. You do this by clicking **Save** under the **File** menu or click on the **Save** icon. Again, you will see that the information is now showing in the **History** box. When you replicate, your SC, 1SG, and Rctg Co commander will see that you have an appointment scheduled when they review their Find screen.

✔ Remember to check the **Save to Outlook** box to post the actions you did today and scheduled tomorrow.

✔ Remember, each time that you conduct the first appointment with the candidate, always show the Today's **Action** field with **INITIAL APPOINTMENT**. Every record should show INITIAL APPOINTMENT for the first appointment conducted with the candidate. This is the only way a record will populate to your Applicant Processing List.

b. We have discussed and shown how to annotate the record for someone that may be interested or has made an appointment. For leads that you find temporarily or permanently disqualified annotate your actions in the **Today** fields. Since you have determined they are disqualified there is no need to enter a **Next Action**, but you should explain in detail why they are disqualified in the **Remarks** field. This is more information for your SC. The SC will not have to guess why the lead is disqualified and can approve your action. Records that are shown as permanently disqualified will be removed from your laptop after your SC has approved the action and replicated.

✔ If you have any questions on what should be recorded in the **Today** box, get guidance from your SC.

Chapter 7

Create a Projection

7-1. General.

a. Being able to create a projection is essential to the processing cycle. Projecting an applicant can mean the difference between your applicant having a smooth transition at the Military Entrance Processing Station (MEPS) or having to sit and wait while the guidance counselor (GC) manually inputs the applicant's data. Projecting also ensures that you receive the data from your applicant's test, physical, and enlistment. This information is also critical for the reporting cycle.

✓ Never project a record with a Status of Lead. If you remember in the earlier chapters, the different records' statuses were defined. If you are ready to create a projection, then the record status should be set as Applicant.

✓ Normally you would replicate a projection after completing the 714A screen and the Prospect screen. There is one exception to this rule. If your applicant has a citizenship other than "US Citizen At Birth," you will need to complete the Citizenship screen before your projection will be accepted.

b. Projecting an applicant's record is like sending a brief resume on that person. Simple information such as name, education level, age, sex, and address are transmitted from the recruiter to the GC at MEPS. Other information that is sent is what type of test, physical, and processing is requested. This information starts the applicant's main record at MEPS, which is used for his or her enlistment.

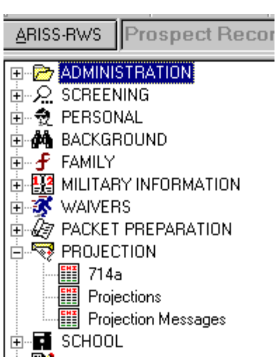
c. The following steps will assist you with creating a Projection:

(1) Access the Projection screen.

(2) Schedule processing for your applicant.

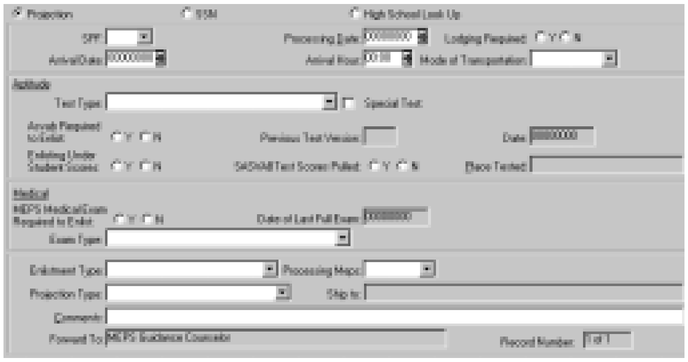
(3) Save and send your projection.

d. You cannot project a record with a status of **LEAD**. The record should show a status of **APPLICANT**, but you can project a **PROSPECT**. However, the status should be changed to show the individual has agreed to process and reflect a status of **APPLICANT**. Now that we have the record in the correct status, let's go create a projection.



7-2. Access the Projection screen.

a. To open the projection window, click on the **ARISS-RWS** tab, click on the **PROJECTION** file folder, and then click on **Projections**. Notice there are three radio buttons. Select **Projection** to project your applicant for processing, the **SSN** selection is used to request information about a prior service member. The **High School Look Up** is used to request the Armed Services Vocational Aptitude Battery (ASVAB) test scores on an applicant who has tested at the high school (HS) or for another service. You may need to fax a copy of the 714a to your GC before the MEPS releases the scores. You see that the remaining projection information is grayed out until you make a selection. Clicking the **Projection** radio button is the only way to open the Projection screen. Selecting the other radio buttons and then saving will automatically perform its described function.



b. Take a few minutes and review the different fields on the Projection screen.

c. First, you need to select **SPF** which is the Service Processing For. Click the **SPF** drop-down arrow and review your choices.

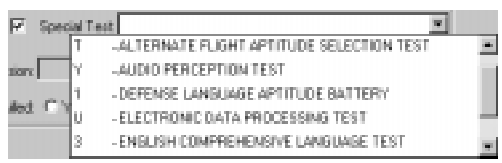
d. Now you must enter the **Processing Date.** This is the date that your applicant will process. This includes the test, physical, and enlistment.

e. You'll need to determine if your applicant needs lodging. If so, click the appropriate response, next to **Lodging Required**.

7-3. Schedule processing for your applicant.

a. Now you need to indicate what processing your applicant is going to do. Your applicant can test, or medical, or do a test and medical. You can set any combination that is applicable to your applicant.

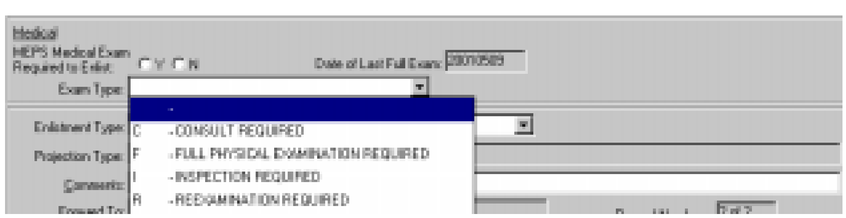
b. Click on the **Test Type** drop-down arrow to see some of the available test types. Notice the **Special Test** box. If the applicant needs a special test such as the Defense Language Aptitude Battery or the English as Second Language test, you would need to select this box. It'll then open another menu item with a drop-down menu with a list of special tests. The different test types are self-explanatory. Normally, you would select **INITIAL** for the **Test Type**.



c. Notice with **INITIAL** selected, the **Previous Test Version, Date**, and **Place Tested** windows are inactive. If this were a retest or confirmation test, the **Previous Test Version** and **Date** would be available but grayed out. If you need to project a retest or confirmation and this information is not showing, you will need to do a **High School Look Up** prior to sending a processing projection. Answer the remaining questions by selecting the **Y** (yes) or **N** (no) responses. If no testing is required, do not make any selections in the **Aptitude** fields.

✔ This is why projecting your applicant's processing data is so important. If your applicant was previously tested and you projected him or her, then the test scores would automatically be returned to you and populate the MEPS Processing Results screen.

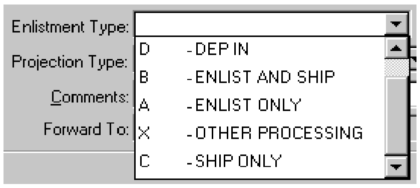
d. Every recruit entering the military must go to MEPS for a medical examination. Click the **Exam Type** drop-down arrow and review the different selections.



Notice that the **Date of Last Full Exam** is grayed out. There will be a date entered if the applicant has already had a full examination. If your GC informs you that a **CONSULT REQUIRED**, **INSPECTION REQUIRED**, or **REEXAMINATION REQUIRED**, confirm the date and time with the applicant and immediately project them.

✔ You want to track all actions that your applicants complete. To do this you must project all actions that occur during their enlistment processing.

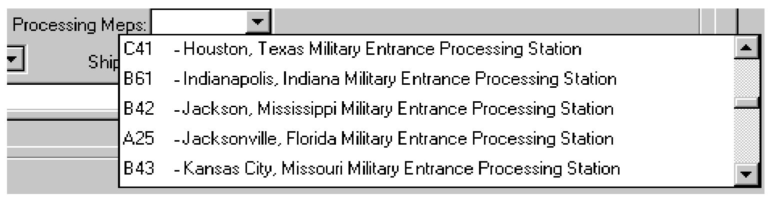
e. If there are no medical processing requirements, do not make any selections in the **Medical** fields.

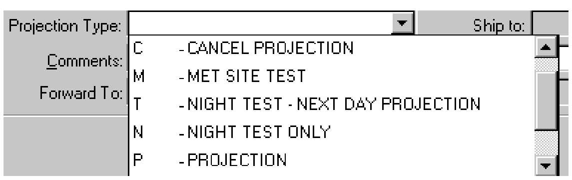


f. Click on the **Enlistment Type** drop-down arrow.

g. Selecting an **Enlistment Type** will depend on what component they're enlisting for. For Active Army select either **DEP IN** for Delayed Entry Program (DEP) or **OTHER PROCESSING**. For USAR select **ENLIST AND SHIP**, **ENLIST ONLY**, or **OTHER PROCESSING**. Use **ENLIST AND SHIP** only if you are selecting **TRR** as the **Projection Type.** For individuals processing for Officer Candidate School or Warrant Officer Flight Training select **OTHER PROCESSING**.

h. Now you need to enter the MEPS the applicant will process through. Click the **Processing Meps** drop-down arrow. To make a quick selection instead of using the scroll bar, type the first letter and number of the MEPS and it will be highlighted for you to select.





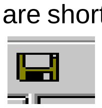
i. You are almost finished completing a projection, there are just a couple of other fields.

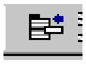
j. Click the **Projection Type** drop-down arrow. A projection type indicates what type of processing your applicant is going to do and, in some cases, when that processing will take place. If you have previously made a projection and it needs to be canceled, select **CANCEL PROJECTION**. You will notice that there is even a projection type called **MET SITE TEST**.

✔ Remember to project your applicant for any processing that he or she needs. Not only will this keep a history of the processing that the applicant has completed, but will also populate the TOS to show the work you have done.

7-4. Save and send your projection.

a. You must **Save** this **Projection** record before you can replicate. To save your projection, click on **File** on the menu bar and then click **Save**. If you want to replicate at this time go ahead and connect your laptop to a telephone line and get your secure connection and send the projection. You can do this by clicking on **File** on the menu bar and then click on **Project/Replicate**.

✔ Remember that there are shortcut icons that you can use instead of clicking on the menu bar. The **Save** icon is represented here  and the **Replicate** icon is represented by the telephone. 

b. It you have previously completed a projection and need to project the applicant for additional processing, do not make changes to a previous projection. You will need to add a new Projection screen and complete the above process. To add a new projection screen, either click on **Edit** and then **Add** or just click the **Add** icon. 

c. And finally, close your projection record. When you close the **Projection Record** you will be returned to the main screen in the application.

✔ Remember to record the actions you did today on your Contact History screen.

Chapter 8

Send a Projection

8-1. General.

a. Being able to send a projection is essential to the processing cycle. Projecting an applicant can mean the difference between your applicant having a smooth transition at MEPS or having to sit and wait. Projecting also ensures that you will receive the data from your applicant's test, physical, and enlistment.

✔ Before you can send a projection, you have to create a Projection, complete the 714A, and complete the Prospect screen first. These are the only three screens that need to be completed before you can send a projection. These are covered in other chapters and if you have any problems with getting an accepted projection message you will need to return to one of these screens to make the corrections and send the projection again.

b. We will assume that you have completed the necessary screens to send a projection and that all you have to do is replicate it to the MEPS.

c. The following steps will show you how to replicate your projection:

(1) Tag a projection for replication.

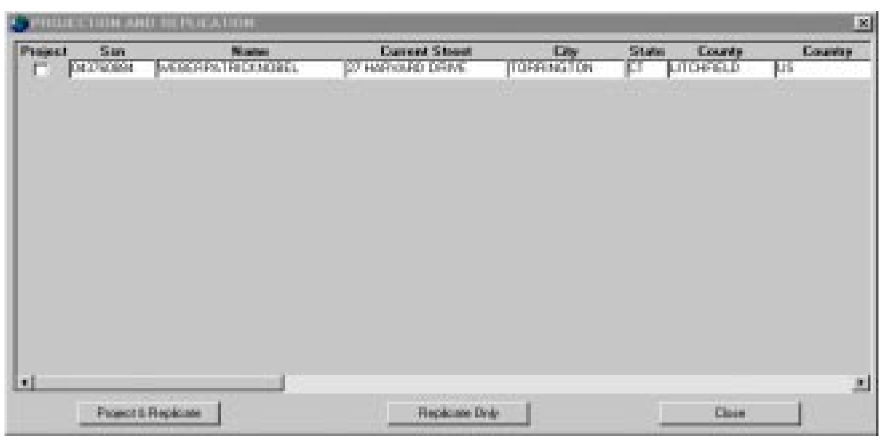
(2) Understand the projection process.

(3) Review projection messages.

✔ Remember that you must have your computer connected to a telephone line to dial-in and have a secure connection by using your PKI disk.

d. You first need to open the **PROJECTION AND REPLICATION** window. Click on **File** on the menu bar and then click on **Replicate/Project** or you can just click on the **Telephone** icon. 

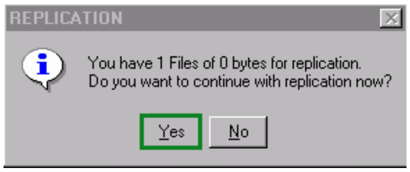
8-2. Tag a projection for replication. In this example, there is just one record in **PROJECTION AND REPLICATION** showing, but you can have several if you have created them. To select a record, click the **Project** box. You've now selected the record for Projection. In order to send the projection, click the **Project & Replicate** button.



✔ By using the bottom scroll bar you can review all of the information that will be replicated to MEPS**.**

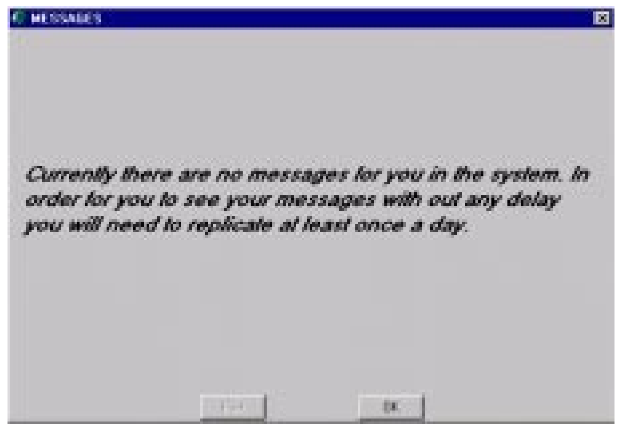
8-3. Understand the projection process.

a. Once the system has connected, you'll see several messages asking you to confirm that you want to continue replication and inform you of files being downloaded and uploaded. There is no need for you to do anything once you confirm that you want to continue replicating. Remember if you have a lot of records to download or upload, it may take a few extra moments to complete the process. You'll want to plan accordingly.

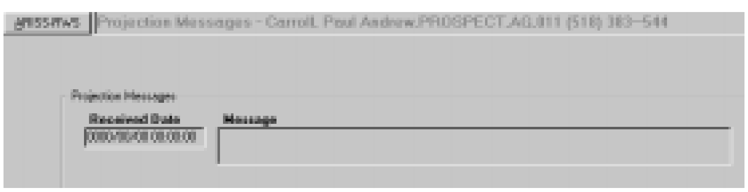


b. Click **Yes** and the files you selected will be zipped and then downloaded. The system then will check to see if there are any files to upload. Once the projection process is complete, you'll be logged out from replication. However, you are still connected to your ISP account.

8-4. Review projection messages.



a. You'll receive a message that will either inform you that there are no messages to review or will summarize the results of the previous projections. Projection messages will show on this screen for 7 days and then will automatically be removed from your message screen. When you've finished reviewing any messages, click **OK**. You've completed projecting and replicating. Now exit this process by clicking **Close** and you will be returned to the ARISS-RWS Leads-Reports main screen.



b. If you want to see a history of the projections that you have made on a record, open that record and under the **ARISS-RWS** tab click the **PROJECTION** folder, you will find **Projection Messages.** This will display the history of the projections you have made on that record. It will show the date and time received and the accepted or rejected information.

Chapter 9

Create a New Lead

9-1. General.

a. Getting new leads is vital to your success in your job. The most important things you do in ARISS are create new leads records and then track and retrieve lead information, both of which are critical for mission accomplishment. Remember that you have seven different sources routinely sending you leads which you will receive during replication. As we discussed in chapter 6, the status of a record is based on what juncture of processing the lead is at.

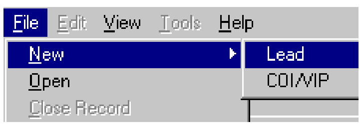
b. The following steps will show you how to create a new lead record:

(1) Open a new lead record.

(2) Capture required information.

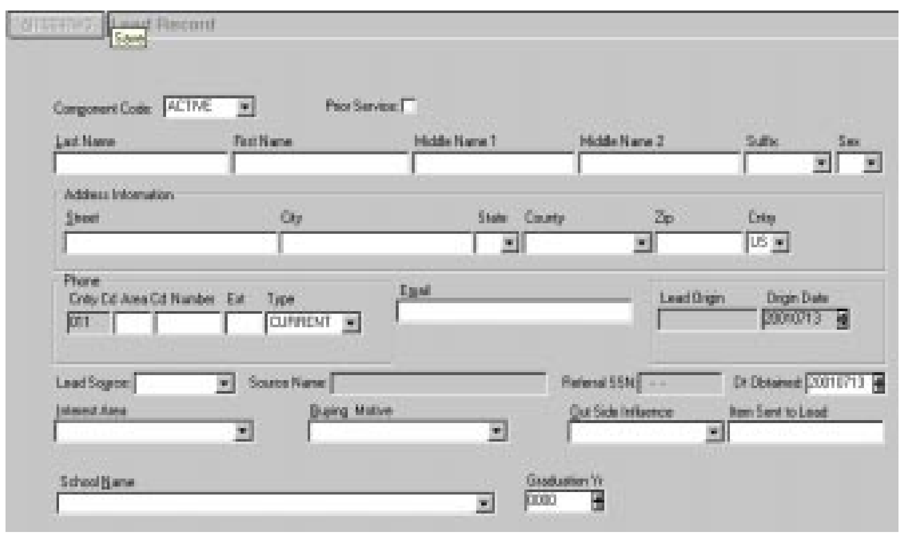
(3) Update contact history.

9-2. Open a new lead record.



a. You begin a new lead record by clicking **Lead** under **File** and then click on **New** or click on the **Open Folder** icon.

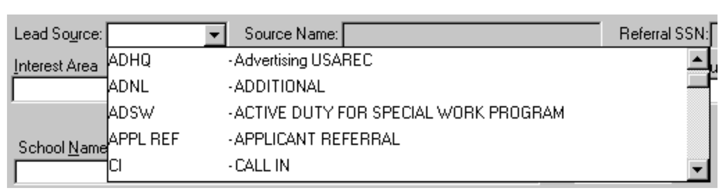
b. This is a new **Lead Record**. Review the blank windows to see what information you'll be responsible for entering. Remember, in order to create a new lead, the minimum amount of information you need about the person is name, address and/or telephone number, sex, and lead source. Also note the **Component Code** will default to the recruiter's role (i.e., **ACTIVE** for RA and **RESERVE** for USAR).



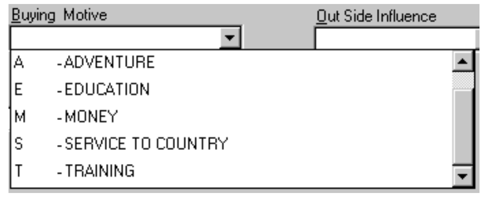
✓ Before you create a new lead make sure that you check your Find screen to ensure that this lead was not provided by another source. This will eliminate unnecessary duplicate records.

9-3. Capture required information.

a. In this example, your new lead's name is Kevin Williams. Review the basic information that you will have to enter. Now take a close look at the selections under the **Lead Source** drop-down arrow. This is where you need to log what method was used to generate this lead.

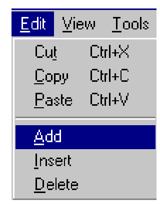


b. If Kevin has expressed a special area of interest, such as being a warrant officer, you will enter that information in the **Interest Area** window. Click the **Interest Area** drop-down arrow to see the special areas available. You can see there are three interest areas. If Kevin did not specify a special interest, leave the space blank.

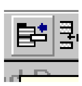


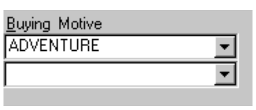
c. Now you need to record his buying motives. Click the **Buying Motive** drop-down arrow to see the different options. In this case, during your telephone conversation Kevin mentioned he is interested in college and watching action movies. You can use this information to focus your sales message on important areas related to his interests.

d. **ADVENTURE** is one of the **Buying Motives** listed, so click on **ADVENTURE**. **ADVENTURE** should now be listed as his **Buying Motive**. Kevin also mentioned a friend of his who is currently in the Army. His friend has told them what a great feeling he has serving his country. His respect for this friend and ideals are also a buying motive.



e. You need to add another line to input the additional **Buying Motive**. To add another line you can click **Edit** and then **Add** on the menu bar or you can click on the **Add Row** icon.

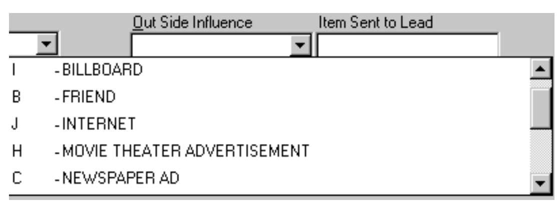




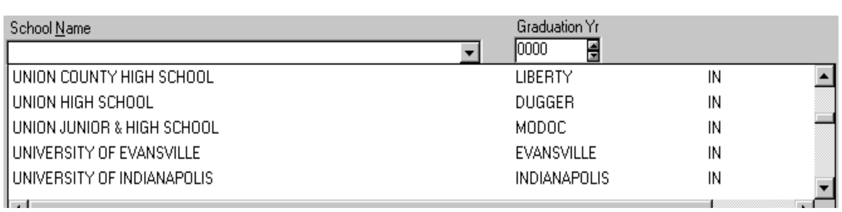
f. Notice under **Buying Motive**, there is a second window with a drop-down arrow. Click the down arrow by the newly added **Buying Motive** window. Click on **SERVICE TO COUNTRY** as his second **Buying Motive**. You can enter up to five buying motives for a prospect.

g. Remember the next time you speak to Kevin that those buying motives are powerful motivators that could influence his decision to enlist.

h. Now let's record an outside influence if there is one. An outside influence can be almost anything or anyone that brings a lead to you. During your telephone conversation with Kevin, he mentioned a friend in the Army and that he called you, because of things his friend told him about how great the Army is. Therefore, Kevin's friend is his **Out Side Influence**. Go ahead and click on the drop-down arrow and select **FRIEND** as Kevin's **Out Side Influence**.



i. You are almost finished creating a new Lead record. All that you need to do is complete Kevin's school information. To record the school, click the **School Name** drop-down arrow. ARISS will populate this list with schools, colleges, universities, and vocational-technical institutes within the United States. You know Kevin is a senior at a local HS. Schools are listed alphabetically by State. You will need to scroll to the appropriate State and then to the



school. Click on a school. You will notice that you cannot type anything in this box. There are several reasons, but understand that this list is used to establish standard naming conventions that will allow you to complete queries. This has been set by USAREC and if you find a missing or incorrect school, notify your chain of command so the appropriate change can be made. Since Kevin is a senior graduating this year, select the current **Graduation Yr**. This date can either be entered by highlighting the box and typing or by using the up and down arrows to select a date.

9-4. Update contact history. Now that you have completed the Lead record, all that's left to do is Save. If you think you are finished with this record, then maybe we need to go back and review chapter 6 about updating the contact history. You have worked hard to get this lead and we know this is not the end. During your conversation, you either identified that you would call him again or he has agreed to an appointment. Click on the **ARISS-RWS** tab and go to your **Contact History** screen and record today's action and show what and when your next action will be.

✓ It cannot be stressed enough that anytime you work on a record, conduct an appointment, etc., that you record your actions in Contact History. Your leadership has visibility of your actions when they review their reports from the TOS. Show credit for what you are doing and annotate the Contact History screen.

✓ You can replicate after you complete this record, wait until you do a projection, or at the end of the day before you leave the office. The best times to replicate are early morning or late afternoon when fewer recruiters are accessing the system.

Chapter 10

Use the Create List

10-1. General.

a. Within the Leads-Reports application you are able to create lists to help you organize and access specific information quickly. As a recruiter, you create lists every day. An example is a precall list of leads for prospecting. With this function, you will be able to build your lists that will be easily accessible whenever you need them.

b. The following steps will show you how to use create list:

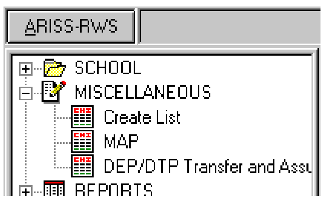
(1) Access Create List screen.

(2) Establish Search For parameters.

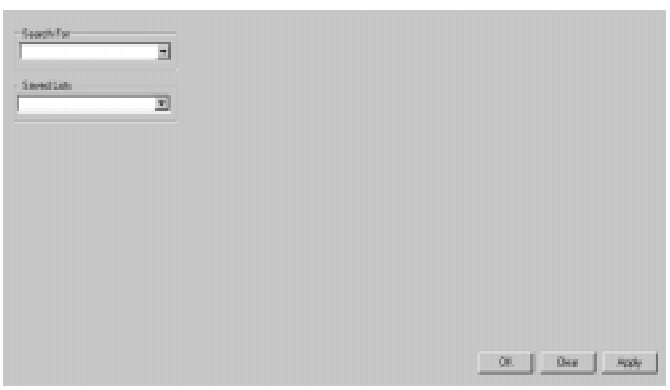
(3) Save the new list.

(4) Benefit of create list.

10-2. Access the Create List screen.



a. To access the **Create List** screen, click on the **ARISS-RWS** tab and then click on **MISCELLANEOUS**. This will be the same if you were at the ARISS main menu or in an applicant's record. Under the **MISCELLANEOUS** menu, there are three options. MAP and DEP/DTP Transfer and Assumption will be discussed in other chapters.

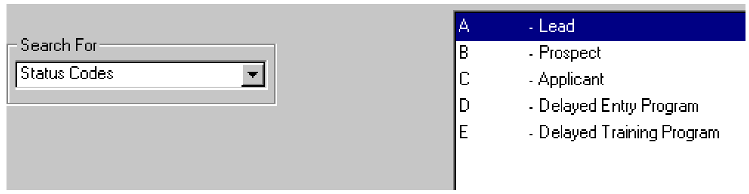


b. When you click on **Create List** this screen will appear. From an initial glance this does not look like much, but this is a fantastic tool. You will soon find out that this function will be your best friend in managing your records. Now let's get familiar with using **Search For**. This allows you to narrow your search to match specific criteria. You will notice that there is a field showing **Saved Lists**. If you have used this function previously and saved your list, you can select that saved list and click on **OK** and your list will appear. The information posted on the list will be based on the current records within your laptop. It will not hold old data from when you worked the list previously.

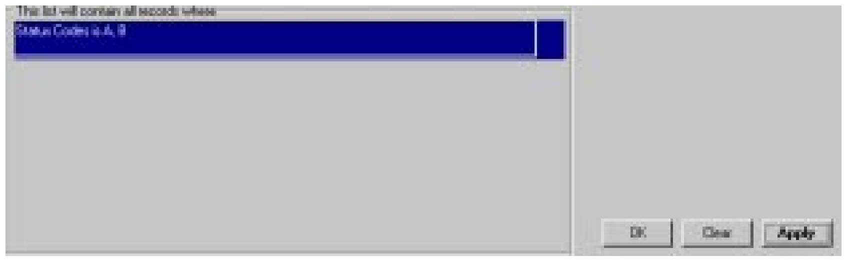
10-3. Establish Search For parameters.

a. Click on the **Search For** drop-down arrow and take a few moments to look at some of the choices you have for narrowing your search. For instance, if you want to target students graduating in 2 years, you would search by clicking on **Projected Grad Year**. Click the **Search For** scroll bar down arrow. As you can see, there are a lot of ways to search your ARISS database. In fact, suppose the Army is pushing for Ranger applicants. You can use the **Create List** function to **Search For** males specifically by clicking the **Sex** option.

b. Once you have selected one of your search parameters, another screen will appear requiring you to further define your search. For example, we want to do a search for all of your leads. Since this is a status code, click on the **Status Codes** drop-down arrow. You now see a range box appear. You will either select one or more of the items shown or enter the requested information. If you want to do a search for **Lead** and **Prospect**, hold down the ***Ctrl*** *key* and then use your mouse to click on **Prospect**.

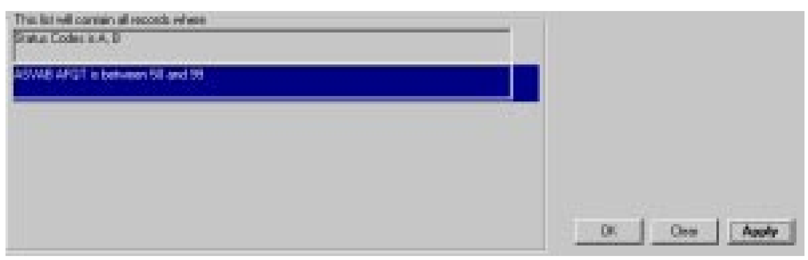


c. Once you have selected the search criteria click **Apply**. Now check the information in the highlighted area. This list will show all the parameters that you've set for your search. You may select more than one option to filter your search. For instance, you can expand your current search to find records that already have an ASVAB Armed Forces Qualification Test (AFQT) score of 50 or higher. You go back to the **Search For** drop-down arrow and scroll down and click on **ASVAB AFQT**. As you can see, another range box opens to define what score range you want to search. Enter the score range and click on **Apply** again.



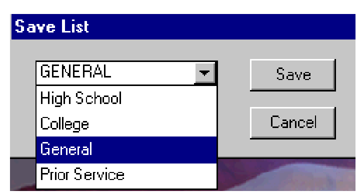
✔ You can continue selecting different Search For options to help you narrow your search.

d. Now that you have set your search parameters all that you have left to do is execute the search. Click on **OK**.



10-4. Save the new list.

a. A message box will appear asking if you want to **Save Query Parameters**. You will be required to select **Yes** or **No**. If the list you created is one that will be valuable in the future, then you'll want to save it for an easy reference, rather than duplicating your efforts. A list that has been saved can be accessed through the Find screen or through this screen. If you choose not to save the list, the results of the query will show immediately. You will have to save the **Create List** if you are going to use Mail Merge, which is discussed in chapter 18. To save a list, select the type of list you want to save, enter a file name that describes the list, and then click on **Save**.



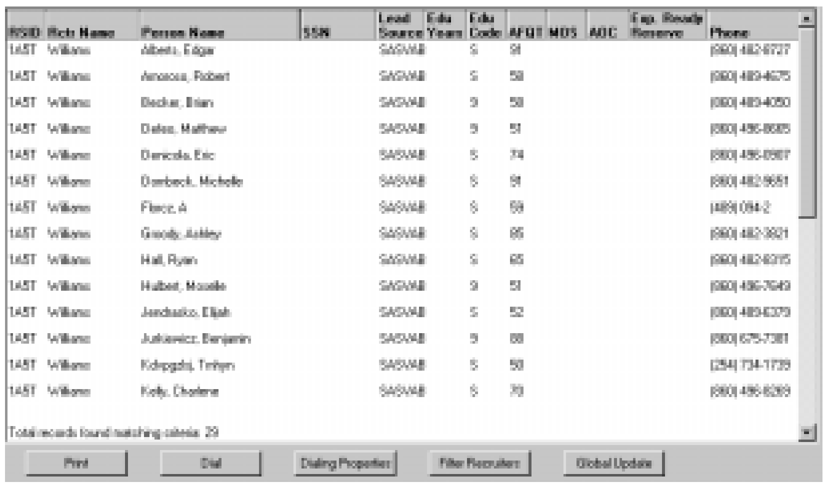
✔ Apply will allow you to set your Search For parameters while OK will execute your search.

b. Depending on how indepth your search is, it should only take a few seconds to produce your report. Upon completion, you will either see the report or a message box that no matching records were found. When you click on **OK**, it will return you to the **Search For** screen so you can redefine your search criteria.

✔ The no matching records message may occur when you try to do a search based upon schools. If you remember, in chapter 9 the school must match what is in the drop-down list. Even though the school is listed on the Lead record, if it does not match exactly to a school listed in the range box, your search will not show any records.

✔ If you saved this list, it will be updated automatically every time you open it so you'll get the most current information from your search.

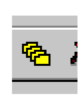
10-5. Benefit of create list.



a. Here are your query results. Notice that the total number of records found to match your query is listed at the bottom of your report. The next time you run your leads query, you may see a different number of total records listed because the query will automatically update with current information. Notice you are able to print a hard copy of this list. The **Dial** and **Dialing Properties** buttons will be discussed in a future update. The **Filter Recruiters** button is for your SC only and will be discussed in detail in chapter 19. Whether you saved the report or not, after clicking on the message box your report will appear. Take a few minutes to review the information that it provides. Does this look like a lead refinement list that you manually had to work? There is more! The report will come to you sorted alphabetically. If you want to sort your report by AFQT, just click on the column header and the report will change to show the highest AFQT first. Click it again and it will start with the lowest AFQT.

b. If you decide to **Print** your list, the information on the list will not be the same that is showing on the screen. The printed version will show the individual's name, address, and telephone number, which will assist you with your door-to-door prospecting.

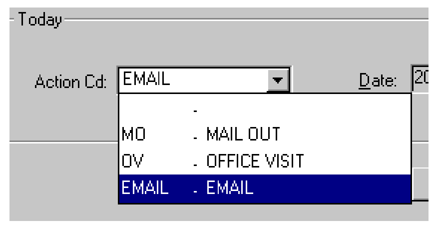
c. Another great thing about this list is if you double click on a record, it will automatically take you to either the **Lead** or **Prospect** record, depending on the status you assigned it. If you have already tried this out, you are probably asking, "Do I have to create another list to get this same report back again?" The answer to your question is no. This list will stay available until you close it. Notice the icons on the tool bar. You should see an icon that looks like a stack of yellow folders. Just click the **View** icon and your list will return. You can also bring back your list by clicking on **View** and **View List**. Once your list appears, double click on the next record and make that telephone call.



✔ Remember to annotate the **Contact History** screen with any actions taken.

d. You thought I forgot to discuss the last button called **Global Update**. If you have several records that you are updating with the same action and result code, this button will allow you to annotate all of the selected records at once. However, you will not be able to change the record status or record your next action from this screen. You can either select one record or several records and then click on **Global Update**. A small screen will appear for you to record your **Action Cd** and **Result Cd**.

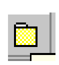
e. You are limited on what **Global Update** will record in the **Action Cd**, but will save you time from opening each record and recording the individual entries.



✔ Remember to check the **Save to Outlook** box to show your actions in MS Outlook.

f. Can you see how this will save time in working those records that are important to you? Your imagination is your only limitation when using the **Create List** function. Since you just learned this function, you need to create a list of all your records to show the total number of records your system has and identify any duplicates.

g. Select all of the **Status Codes** on the **Search For.** After the list appears, look for those duplicate records. Identify the ones that you want to keep and code the rest as duplicate on the **Contact History** screen.

h. Also notice the **Close Record** icon.  You can use the icon or click on **File** and **Close Record** to exit this function.

Chapter 11

Prepare an Enlistment Packet

11-1. General.

a. Completing a quality enlistment packet is one of the most important tasks you must accomplish. Attention to detail is a must to ensure an accurate enlistment packet and the smooth processing of your applicant through MEPS. The information that you enter here will also feed reports to higher echelons.

✔ If a process is not listed here, please review the table of contents for information on that subject or screen.

b. Before we get started, let's discuss what screens you should use based on the status of the record you are processing. There are some screens that you will not use until the applicant is starting to process for enlistment. If you remember from other chapters we identified five different record statuses. However, we are only going to worry about the first three: Lead, prospect, and applicant. When you think about it, once the record has a status of DEP or Delayed Training Program (DTP), that individual is already processed for enlistment and is waiting for training to start. Maybe the information below will help identify what screens should be used with the different record statuses.

(1) A record that has a Lead status should have the Lead Information and Contact History screen. You can use the Prequalification screen during your initial contact, but you can complete it during your initial appointment.

(2) When you change the status to Prospect, you will want to complete the Contact History, Prospect, Prequalification, and the Sales Presentation screens. The last two screens are not required, but should be completed to record the information that you captured during the interviews.

(3) The last record status that we will cover is Applicant. You will need to complete the remaining screens to complete the individual's enlistment packet. You will see that most of the data you collect is for the applicant's security clearance application.

c. This chapter is a little different than that of the others and will be broken down by major folders and discuss the supporting screens. If a screen function is shown under a folder and not discussed in this chapter, review the table of contents for that specific function. For example, we will not discuss Lead Record or Contact History in this chapter, but we did dedicate separate chapters covering those functions.

(1) Process from Lead to Applicant.

(2) Projection folder.

(3) Administration folder.

(4) Screening folder.

(5) Personal folder.

(6) Background folder.

(7) Family folder.

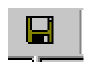
(8) Packet Preparation folder.

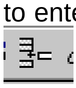
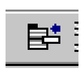
(9) EPSQ folder.

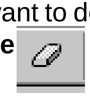
d. Take a few minutes to review the different folders under the **ARISS-RWS** tab. Where you see the plus sign next to a title, it identifies additional screens. When you see a screen or screen field that is grayed out, no data can be entered. This information may have been replicated down from another source.

e. The ARISS-RWS Leads-Reports application was designed as a one-time data entry application. In layman terms, once you enter data on one screen it will automatically populate that data to other screens. This is one of the reasons that we recommend you follow the process that will be discussed below. We will not discuss every entry for every screen. Remember, if you see a drop-down arrow, you must select the data listed in the drop-down. Whenever there is a free text field, do not use any punctuation or characters in that field. In most cases this information is already coded within the application.

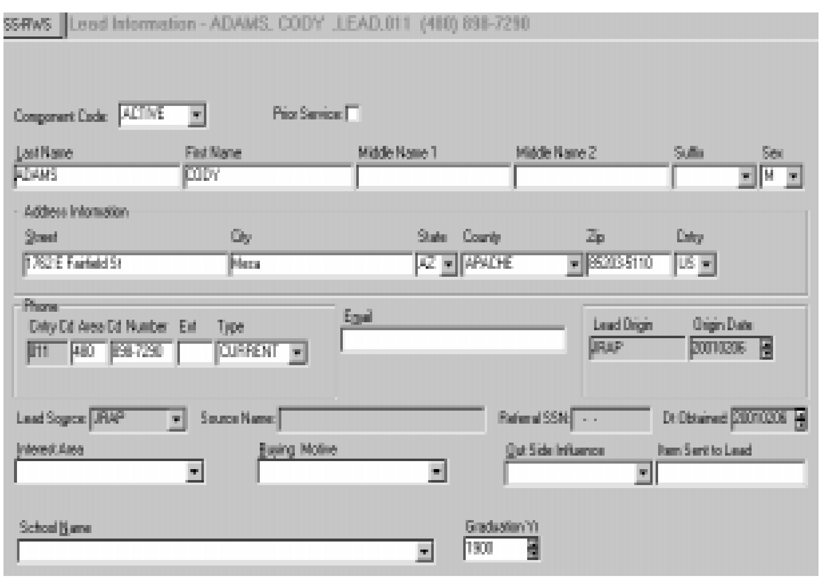
✔ During this process you will be instructed to do specific actions. To eliminate the redundancy of showing these steps over and over, we have identified the most common ones below.

-- When you are instructed to save the information you can click on **File** from the menu bar and then click **Save** or you can just click on the **Save** icon. 

-- In several cases you may need to enter additional information in the same field. For example to enter multiple addresses (current, home of record, temporary) in the address line you will need to add or insert a row for each additional address. To do this, simply put the blinking cursor in the field that you want to enter new data and click on **Edit** and then click on **Add** or **Insert** or you can just click on the **Add** icon  or **Insert** icon. 

-- To delete information in a free text field, put the blinking cursor in the field that you want to delete the data and click on **Edit** from the menu bar and click on **Delete** or you can just click on the **Delete**  icon.

11-2. Process from lead to applicant.

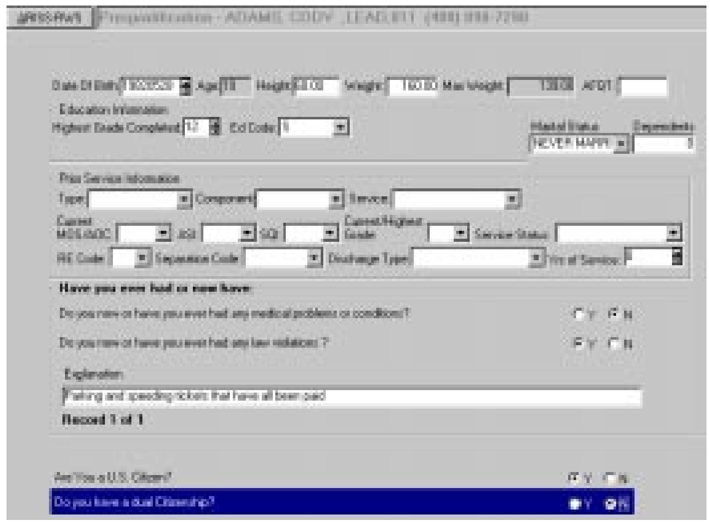


a. Now that we have covered some of the routine steps that you will encounter, we now need to start working our records. We have covered the Find screen in previous chapters, so we will assume that you know how to locate and open a record that you want to work on. Once a record is opened, the first screen you will view is the Lead Information or Prospect Record, depending on the record status. Let's start at the beginning and review the Lead Record. Click on **Lead Record** if not already opened.

b. This is Cody Adams' lead information record. We are going to use his record as an example in this chapter. Once the record opens ensure there is a **Lead Source** entered. If you are calling this individual you may need to make a mental note to obtain the missing information during your telephone call.

c. Today you made a call to Cody and discussed how the Army could help him meet his goals. He has agreed to meet with you tomorrow to discuss these opportunities further. While you were talking he provided information about his education and other personal information.

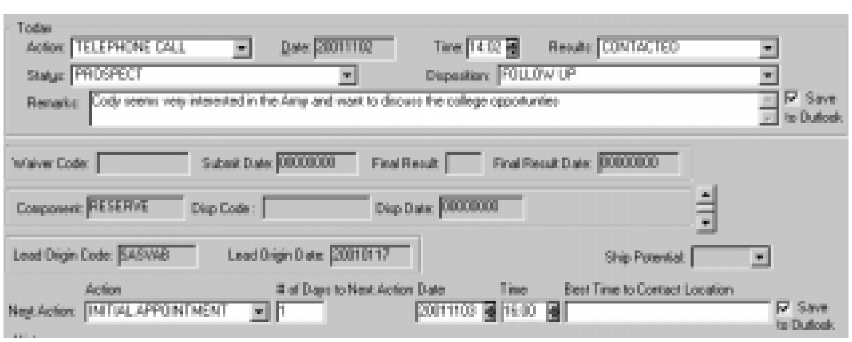
d. During your conversation you enter any missing information on the **Lead Information** screen. Now click the **ARISS-RWS** tab and click the **Prequalification** icon. Prequalification is done to ensure that you're talking to an individual that meets the basic enlistment qualifications. You wouldn't want to make an appointment with a person who has something that would immediately disqualify them. Prequalification will alert you to any potential problems that your prospect may face during the enlistment process. This should be completed during your initial contact, so try to establish a habit of opening and recording any information during this time. Now enter the data that Cody provided on the **Prequalification** screen.



e. Most of the fields are self-explanatory. Complete the fields that are blank. This is not a required screen, but used as a reminder to ask different questions during your conversation. To move to another field, use the ***Tab*** key. There are four questions that need to be answered with a **Y** (Yes) or **N** (No). If the answer to the first two questions is Yes, you can enter additional information in the **Explanation** field. However, there are other screens that you will need to record specific information on his medical condition and law violations. Now you'll need to **Save** the information that you have recorded in the **Prequalification** screen.

f. In order to record your most recent contact with him, you'll need to bring up the **Contact History** screen. Click the **ARISS-RWS** button and the click the **Contact History** icon.

✔Every time you work on a record, annotate your actions in the Contact History screen. This will keep your database updated and when replicated show your chain of command that you are diligently working your records.



g. You're going to change the status of Cody Adams from a Lead to a Prospect since he agreed to an appointment. If you were updating his record for a different purpose, you could start with the **Action** window. Click the **Status** drop-down arrow and click **PROSPECT**.

✔Before you can enter the correct Action and Results make sure you have the correct Status selected.

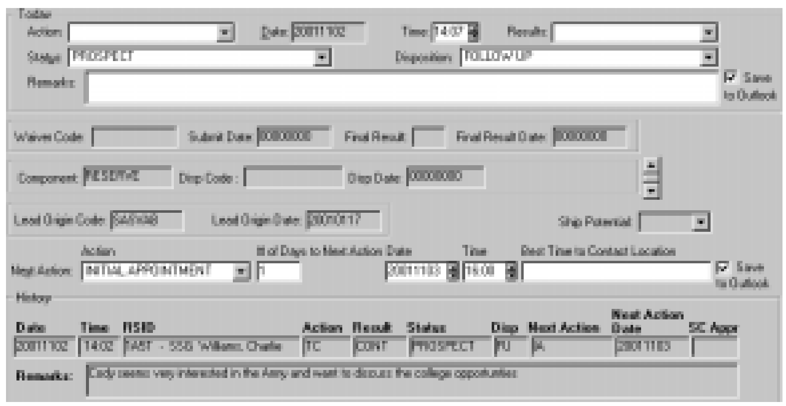
h. Record the **Action** you accomplished today by clicking the drop-down arrow and click on **TELEPHONE CALL**. The **Date** window will default to the date you accessed the record and cannot be changed.

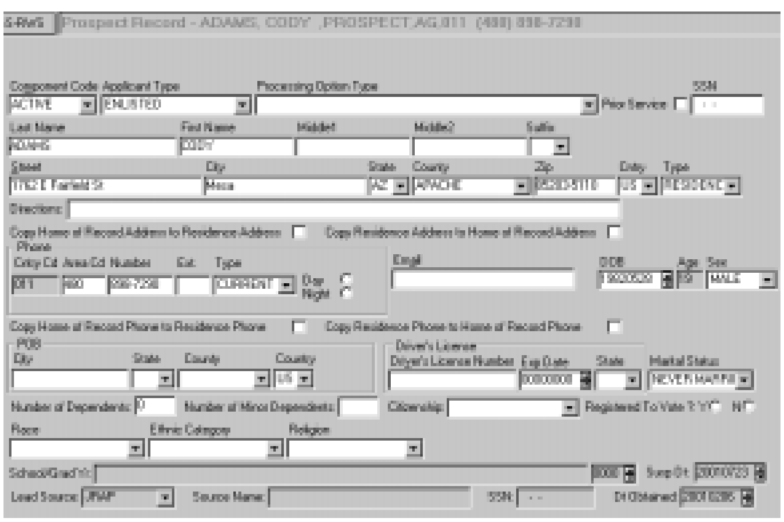
The **Time** will also default to the current time when the record is accessed, however it can be changed. Click the **Results** drop-down arrow and click **CONTACTED**. You can type in any information you've gathered from your telephone conversation with Cody Adams in the **Remarks** section. Now enter your **Next Action** information. Click the **Next Action** drop-down arrow and click **INITIAL APPOINTMENT**.

✔ For your initial interview, always ensure you select Initial Appointment in the Next Action field. You will want to record the Initial Appointment in the Today Action when you actually conduct that initial interview. This will ensure that your lead source analysis report is updated and your SC can key off this for his or her DPR.

i. If there is an entry in the **Next Action** field you will be prompted about replacing the existing next action, so click **Yes**. The system will default to today's date, but you can also change it. The **Best Time to Contact Location** is an optional window. Now **Save** your information.

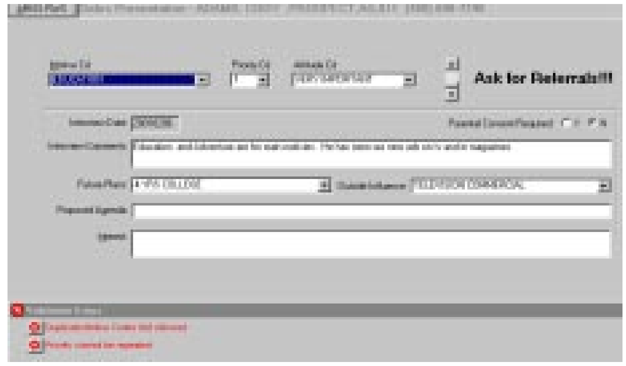
j. You've completed updating the Contact History. The **History** section now reflects the data you've just saved. The information that was recorded in the **Next Action** field will now show an appointment when you open your **Find** screen.



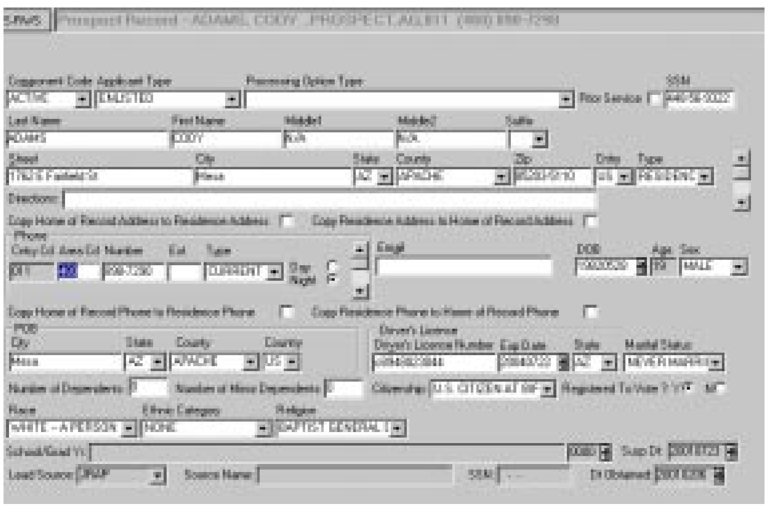


k. For our purpose, it is now the next day and Cody should be coming in for his Initial Appointment. Open his record and this time it will open to the **Prospect** screen. From this point on the application will default to the **Prospect** screen. Review the information recorded on this screen. You can see that information from the previous screens has already populated the **Prospect** screen fields. Take a look at the **Component Code** and **Applicant Type** windows. The **Component Code** will default based on your login, either **ACTIVE** or **RESERVE**. The code can be changed depending on whether the individual wants to enlist for Active or Reserve. The **Processing Option Type** window is where you would note any type of special processing such as the **Band** option or an **IRR** transfer. The other information is self-explanatory. Take a look at the options under **Citizenship**. If the individual is coded anything other than **US Citizen at Birth**, you will need to complete the information on the **Citizenship** screen. You will notice that there is only one line to capture the different addresses and telephone numbers. This is where you would use the **Add** or **Insert** function to record those different addresses. A scroll bar will appear to the right of the fields indicating additional information.

l. In preparation of Cody's arrival, you have the **ARISS-RWS Leads-Reports** application open to the **Sales Presentation** screen and you can have the **Army Sales Presentation** application opened and minimized. This will allow you to show the sales presentation and then, using the ***Alt + Tab*** keys, go and record his attitude and priorities to the different motives. The **Sales Presentation** screen is optional, but when used properly can provide information for you to focus on when trying to convince that difficult individual. The above screen shows a couple of error messages in that you cannot duplicate the Motive or Priority. If this error occurs make the corrections. Once you have completed your presentation and recorded your comments on the **Sales Presentation** screen, click **Save.**

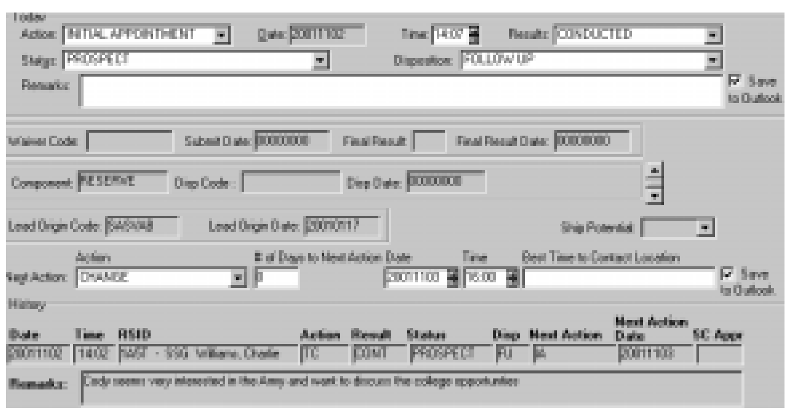


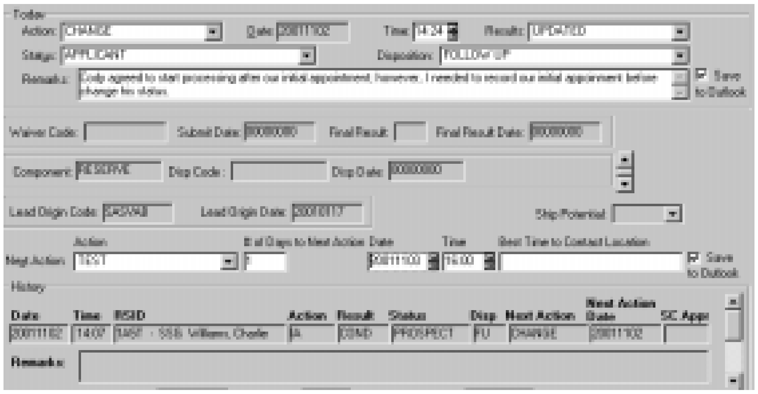
✔ As you can see your laptop has everything available for you in conducting your interview. There is one thing that you have to do that the laptop cannot. I know with technology today, that is hard to believe. But you have to ask the question. Cody do you want to start processing on Tuesday or Thursday?



m. Now go back to the **Prospect** screen and ask Cody those questions to complete the missing information. Once that information is entered click on **Save** to update the **Prospect** screen. A scroll bar appears next to the address and telephone number fields indicating additional information has been entered.

n. If Cody agrees to start processing, then he is no longer a Prospect and his **Status** needs to change to **APPLICANT**. Do you remember where that change needs to be annotated? If you thought of the **Contact History** screen you are correct. But before you change Cody to an applicant, you must record that you conducted your initial appointment. Since there is no action for initial appointment under Applicant, record the action as a Prospect and show the **Next Action** as **CHANGE**. Immediately make the status change and record your action and next actions that your applicant is scheduled for. This will show the progression from Lead to Prospect to Applicant. Click on the **ARISS-RWS** tab and click on





Contact History. If Cody did not agree to process but wants to wait, he will still be considered a Prospect. Enter **Today** and **Next Action** information. Since Cody agreed to start processing we need to change the **Status** to **APPLICANT**. Now complete **Today's Action** and **Results** and record your **Next Action** and **Date**. Click **Save**.

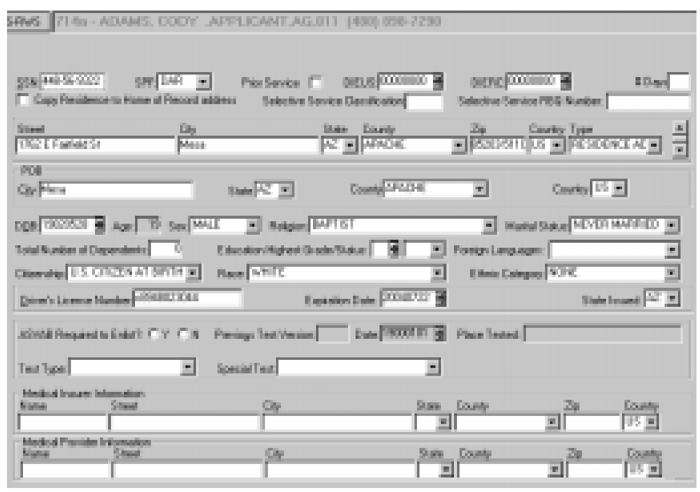
✔ It cannot be stressed enough about the **Contact History** screen. Whether you are doing an appointment or just updating the record, annotate what you did in **Today's Action** and update the **Next Action** fields if necessary. There may be times when you update the record, but the next action does not change.

11-3. Projection folder.

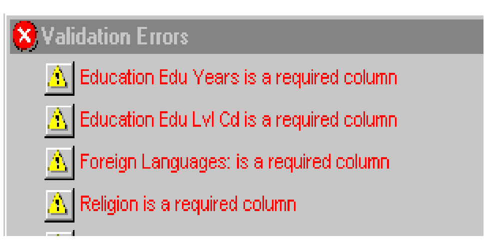
a. Since Cody has agreed to process we need to electronically project Cody to take the ASVAB test and complete a physical. Click on the **ARISS-RWS** tab and click on **PROJECTION**.

✔ The red checkmark next to the screen title indicates you have completed the required data on that screen.

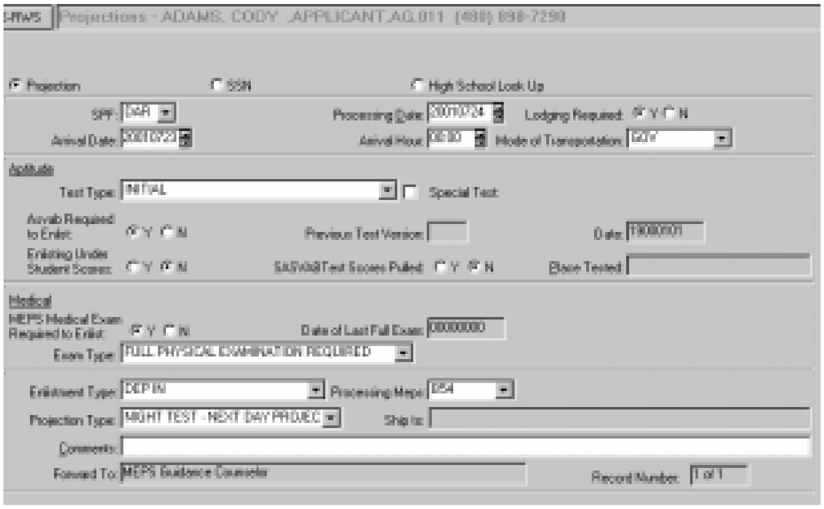
b. Once you click on **PROJECTION**, three other screen titles appear. The **714a** and **Projections** are the two screens that must be completed every time you want to schedule your applicant for further processing. The **Projection Messages** screen will display previous projections replicated to the TOS. There are separate chapters that cover Creating a Projection and Sending a Projection, but this is a critical and simple function if you understand it. Click on the **714a** to create an initial projection.



c. Once you have completed the **714a** there will be no need to update every time you send another projection. You will need to complete this screen only when you are creating the applicant's initial projection. You will notice that most of the information is already filled in. This is the one-time data entry function that is provided by the ARISS-RWS Leads-Report application. Update any missing information and click **Save**.



d. Before we go too far, let's take a minute to discuss a screen that could appear when you try to save the screen information. If you failed to complete a screen field you will see a **Validation Errors** message. This screen will identify those fields that you left blank and



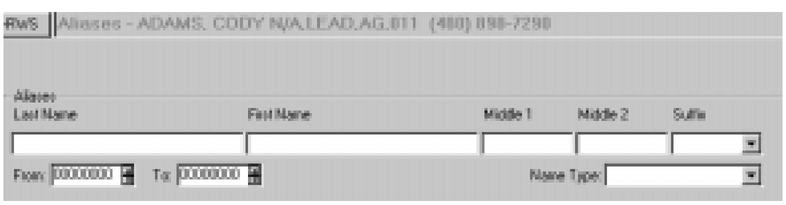
should be completed. If the message is preceded by a yellow triangle this data will be needed to complete the enlistment packet. You will be allowed to save the information and continue. However, if the message is preceded by a red circle with an X in the center, you must enter that information before you can continue.

e. Now click on the **ARISS-RWS** tab and then click **Projections**. You will use this screen more than any other shown in this application.

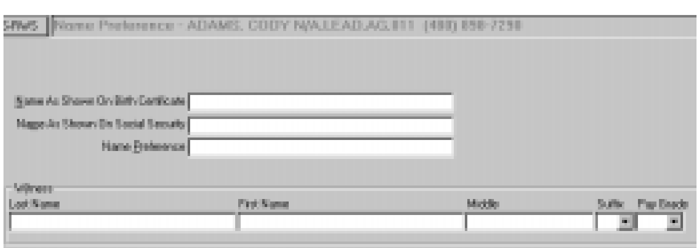
f. To understand the functions of this screen review chapter 7 on creating a projection. Chapter 8 discusses the process for sending a projection. If you are going to use this application to its fullest capability, you will need to understand and know these two chapters. In our example here, you have completed and saved the Projection screen. Now get connected to your ISP and establish a secure connection and replicate this projection.

11-4. Administration folder.

a. You inform Cody that you will need his personal information so you can update the remaining screens and complete an enlistment application. From this point on, we are going to discuss the remaining screens that you will need to complete for an enlistment packet. As mentioned before, there are some screens that are for your information and do not need to be completed for the enlistment application.

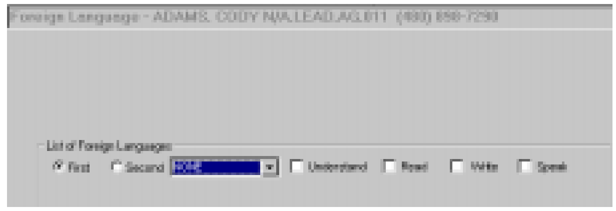


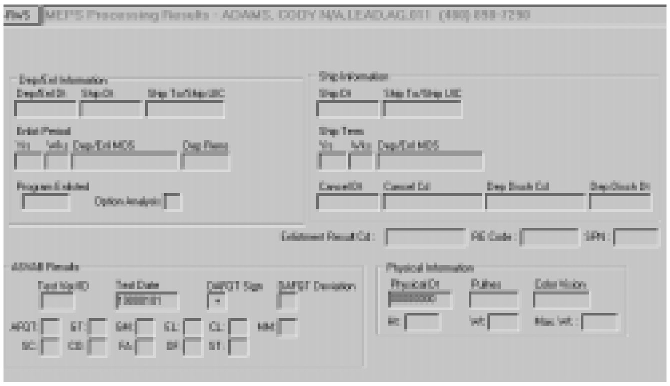
b. First, let's review the remaining Administration screens. Click on the **ARISS-RWS** tab and click on **ADMINISTRATION**. The red checkmarks indicated that you have already completed that screen. Click on **Aliases** and briefly review the information you'll need to enter regarding any aliases your applicant may have. In this case Cody Adams does not have any. But if your applicant does have an alias, enter the information. If you need to add more than one, place the blinking cursor in the **Last Name** field and then click the **Add** or **Insert Row** icon to add additional aliases.



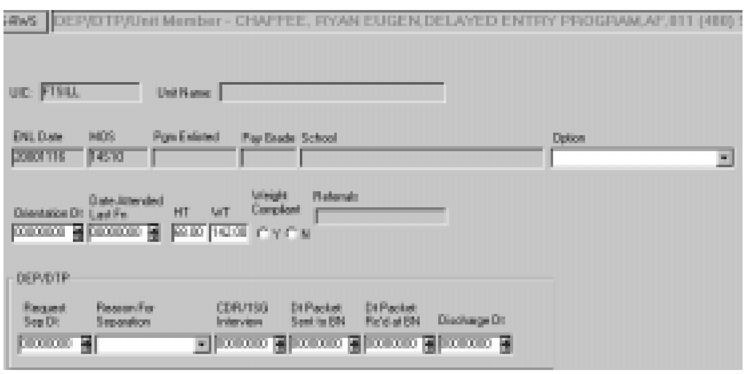
c. Click on the **ARISS-RWS** tab to get back to the menu. Now click on **Name Preference** to review the information that you may need to fill out. These two screens are self-explanatory and only need to be completed if they apply to that applicant.

d. Click the **ARISS-RWS** button. Click the **Foreign Language** icon to review the information you'll need to record if your applicant has any foreign language proficiencies. If more than one entry is required, click on the **Add** or **Insert Row** icon.



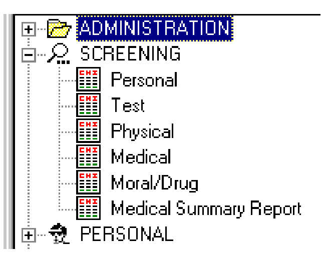


e. Click the **ARISS-RWS** tab to return to the main menu. Click the **MEPS Processing Results** icon. Notice that all of these fields are grayed out. You cannot enter any data on this screen. If you always project your applicant for all processing, this information will automatically replicate down. If your applicant had taken the SASVAB, those results would be showing where the ASVAB box is. Once the applicant takes the ASVAB test the SASVAB results will automatically be replaced with the new data.



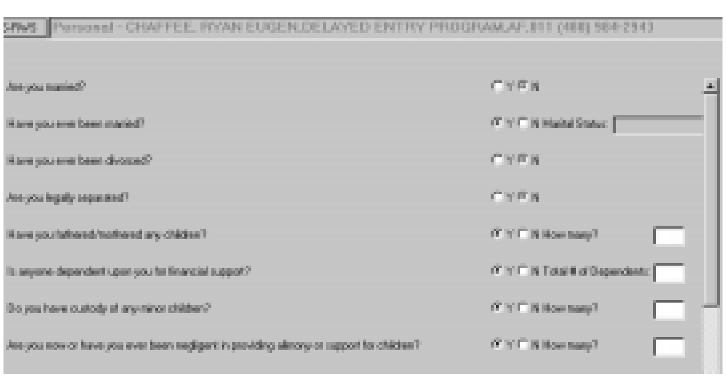
f. Click the **ARISS-RWS** tab to return to the main menu. The only screen left is the **DEP/DTP/Unit Member** screen. Unless your applicant has a Status of DEP or DTP this screen will not be available for you to review. If they have the correct Status, you would enter the information about their attending your DEP or DTP **Orientation** and track their **Ht** (Height) and **Wt** (Weight). If for some reason they requested to be discharged, you would enter the tracking information at the bottom.

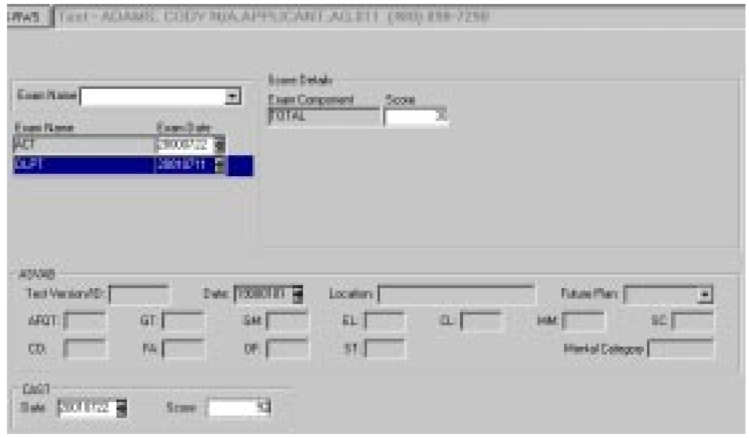
11-5. Screening folder.



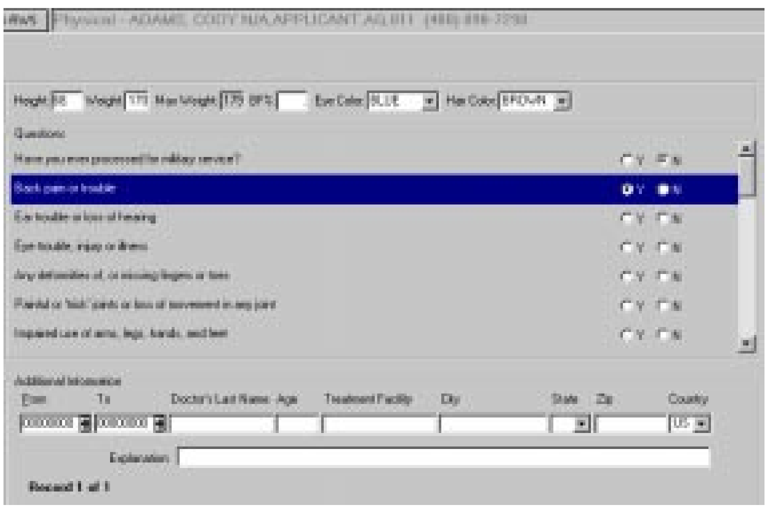
a. We have covered the different screens under Administration, so let's discuss the different screens under **SCREENING**. Start by clicking the **ARISS-RWS** tab and then click the **plus sign** by **SCREENING**. Take a few minutes to review what screens are under **SCREENING**. Let's review the first one. Click on **Personal** to review the information required on this screen.

b. Some of the questions may already be answered based on information you entered in the Prospect screen. If you answer Yes to a question, you may be prompted to complete an additional screen next to that question. Answer the questions by clicking **Y** (Yes) or **N** (No). Click the scroll bar down arrow to answer all of the questions. Once completed **Save** your work. If you forget and try to exit the screen, you will be asked if you want to save this information. Just click **Y** (Yes) or **N** (No) and continue.

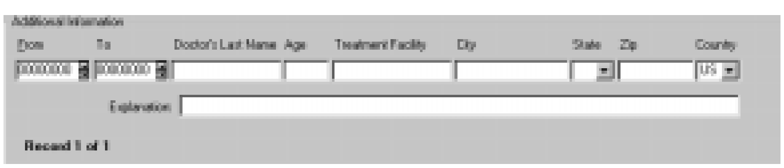




c. Click the **ARISS-RWS** tab and now click on **Test**. Take a look at the information required in the **Test** section. For example, Cody Adams has taken the **ACT**. So click **ACT** to enter the information in the **Exam Name** window. You will need to enter score and date. Continue entering any exams they may have taken. This is one area you do not need to use the Add or Insert Row function. Each time you add a new test a new line will appear. Again, the **ASVAB** data fields are grayed out. This information will be replicated to you after the applicant takes the **ASVAB** test. The **CAST** (Computerized Adaptive Screening Test**)** section refers to a testing program on your laptop. The Computerized Adaptive Screening Test (CAST) or Enlistment Screening Test is given to all prospects and is used to determine how well the individual should score on the ASVAB.



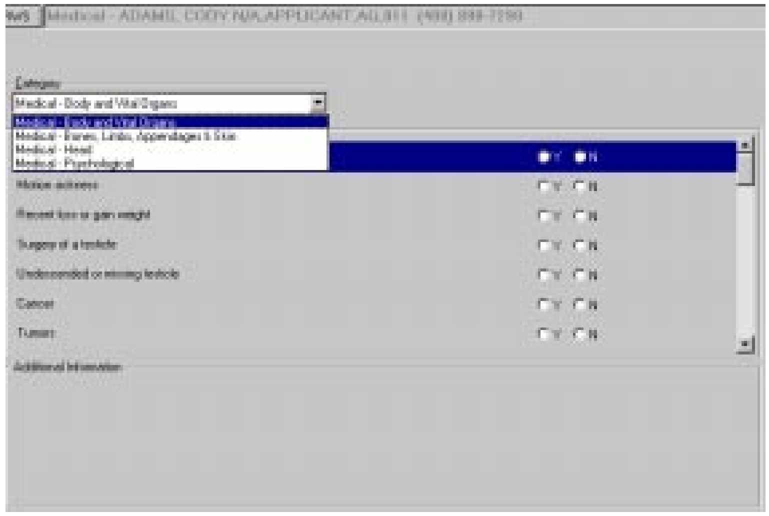
d. Let's move on to the **Physical** section of **SCREENING**. Click the **ARISS-RWS** tab and then click on **Physical**. The physical part of the enlistment packet is very important. You must make sure that you provide accurate information as it may affect your applicant's chance of enlistment, as well as special enlistment options like Airborne. Enter the **Height** and **Weight** data. In order to move to the next window, use the ***Tab*** key on your keyboard. Notice a weight has been entered in the **Max Weight** subdued window. This window will automatically populate after you've entered a **Height** and ***Tab*** to the next window. Using the drop-down arrows to select the applicant's **Eye Color** and **Hair Color**. Review and answer each of the questions shown. If you answer **Y** (Yes) to one of the questions a screen will open requesting **Additional Information**. If there are multiple entries on one of the questions, use the **Add** or **Insert Row** to record the additional information.



Use the scroll bar to answer all of the listed questions. Once you complete the **Physical** information, **Save** your work and then move on to the Medical section.

e. Again, it is crucial to accumulate as much background medical information on your applicant. This process is necessary due to the fact that the applicant needs to be in good health, both mentally and physically before entering the service. To enter the medical information, click on the **ARISS-RWS** tab and then click **Medical**.

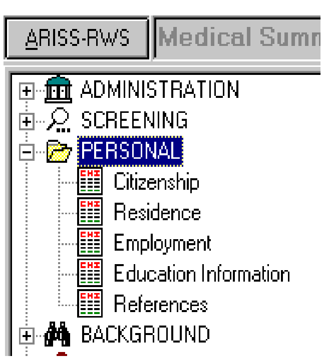
f. If you understood the process for completing the Physical information then you know how to complete the **Medical** information. Your first task is to input information on the applicant's body and vital organs. You choose this category from the **Category** drop-down arrow. There is a series of questions pertaining to each category and **Y** (Yes) or **N** (No) answers for the applicant to choose. Notice the scroll bar on the side of the question box, this means that there are more questions to answer. After you have completed a **Category**, **Save** your work. Click the **Category** drop-down arrow to select another category and answer those questions. Once you have finished answering the questions in all categories you are ready to go to the next screen.



g. Now let's work on the **Moral/Drug** section. Click the **ARISS-RWS** tab and click on **Moral/Drug**. This section consists of questions relating to your applicant's moral and drug history. Included are questions relating to civil court actions, all criminal charges and traffic citations. Once this section is completed, any charges listed will automatically populate to the appropriate form(s) for printing and security application. Take note that if there was no one else involved, you must enter ***Self*** for **Names of Parties Involved**. If there are multiple entries on one of the questions, use the **Add** or **Insert Row** icon to record the additional information.

h. Once you have completed the **Moral/Drug** information section you are through entering data under the Screening section. The Medical Summary Report is the only option left under the Screening section. There is no information to input in this record. It merely summarizes the medical information you've already input throughout the Screening section.

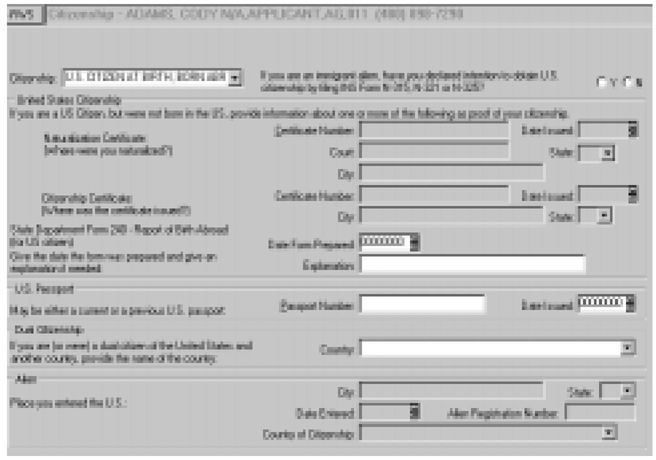
11-6. Personal folder.



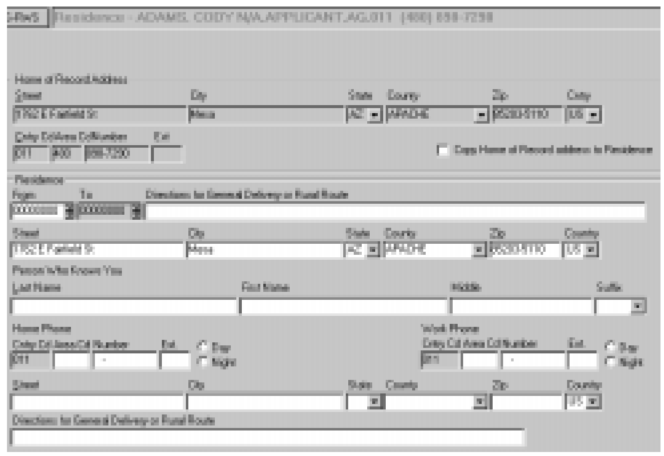
a. Let's move on. Click the **ARISS-RWS** tab and click the **minus sign** by **SCREENING** to close this section. Click on the **plus sign** next to **PERSONAL** to display the other sections that need to be completed. We now need to accumulate and record the information regarding the applicant's personal background. The majority of this information will be used to complete his or her security application. So let's get started. Click on **Citizenship**.

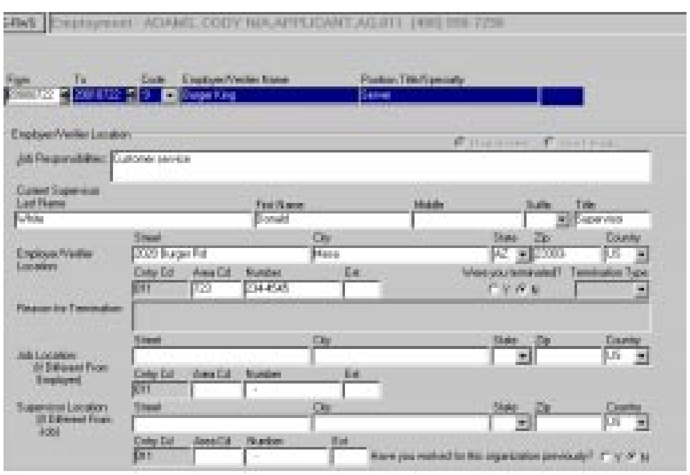
✓ Several screens will require you to enter several years of information. Be very careful with the dates and ensure they run concurrent for that section.

b. The citizenship status should already be filled in based on the information you entered on the Prospect screen. If you need to change it click the **Citizenship** down arrow. Based on the **Citizenship** status you selected, you may need to complete some additional information fields. Those fields that need to be completed will open for you to enter the additional information. Those fields that are grayed out are not required based on the **Citizenship** status you selected. Now **Save** the record and go to the next screen.

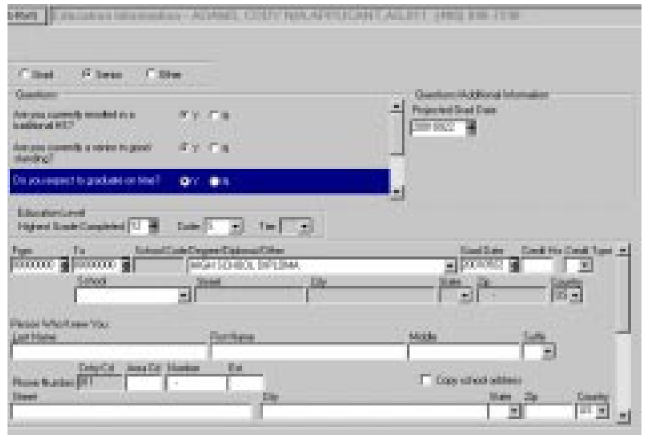


c. You've finished the **Citizenship** screen. Let's begin work on the **Residence** information. Click the **ARISS-RWS** tab and then click on **Residence**. Take a moment to review the information on the screen. Notice that the **Home of Record Address** is grayed out. Remember you entered that data on the Prospect screen. The applicant's address is already completed but you do need to enter the **Residence From** and **To** dates. You're required to record 7 years of residence information on your applicant. Now look at the other information needed on the **Residence** screen. If there are multiple addresses, use the **Add** or **Insert Row** icon to record the additional information. Now you need to **Sav**e your information and go to the **Employment** screen.



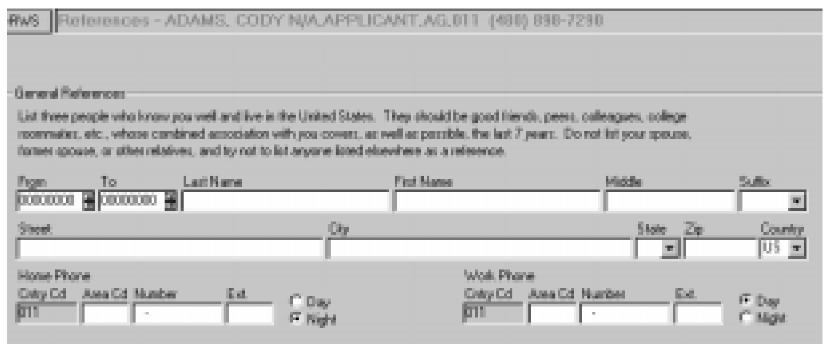


d. Click on the **ARISS-RWS** tab and then click **Employment**. Take a minute to review the information you'll need your applicant to provide. You must also record the previous 7 years of employment information or from age 16 to the present, if your applicant has worked for less than 7 years. Since this is a record of your applicant's employment history, you may need to add another record for additional employment. If there are multiple addresses, use the **Add** or **Insert Row** icon to record the additional information. If the job location and supervisor were the same as the employer, there is no need to enter anything in those windows. For periods of unemployment you will need to list a person that can verify the information in the **Current Supervisor** fields. Now **Save** this information and go to next section.



e. Click the **ARISS-RWS** tab and then click **Education Information**. In this screen, you'll record information such as whether your applicant graduated, where they went to school, highest grade level completed, and a reference of some-one who knew your applicant at that school. Depending on which radio button you select, a list of questions will appear for your applicant to answer. If you answer **Y** (Yes) to some of the questions, you will be prompted for additional information. These questions are designed to get a detailed educational background. Now you'll need to record his or her **Education Level** information. Normally this information will be entered already. This information comes from the 714a screen that you completed earlier. If you were recruiting someone that had more than one school in their background, you would add another record by clicking the **Add** or **Insert Row** icon. There is no need to record the **Credit Hrs** and **Credit Type** for an HS entry, but may be required for other schools. Select the school from the drop-down arrow and enter the **Person Who Knew You**. If that person is from the school, click on **Copy school address** to enter that address. Once you are finished click **Save**.

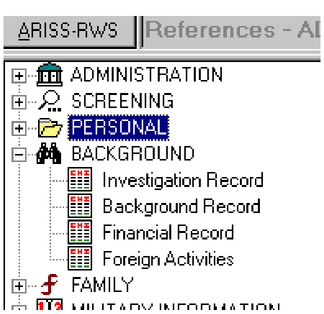
✔ There was an education code change from "Z" to "F" that identifies those individuals that completed HS, but did not pass the exit exam.



f. Now let's go on to the next section by clicking on the **ARISS-RWS** tab. The next screen that needs to be completed is **References**. In this section you'll list those persons that know your applicant. Now review the information. Your applicant must supply three references. After you have entered one reference you will need to input two more. To add another reference, place the blinking cursor in the **Last Name** field and click on the **Add** or **Insert Row** icon. Enter the second and third reference. Once you have entered the three references, **Save** this information. You have now completed all the screens under **PERSONAL**. It is time to complete the next section.

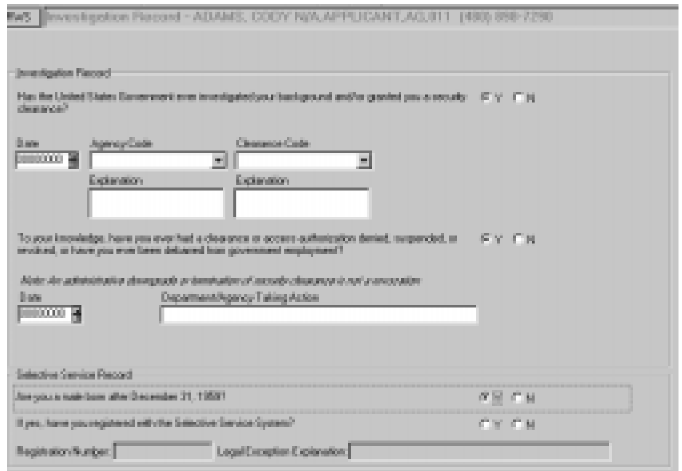
✔ As you can see there is a lot of information that needs to be completed for an enlistment packet. You will need to schedule time with your applicant to gather and record all of this information. If you spend a couple of days completing the required data, ensure you annotate the Contact History each time you work on the record.

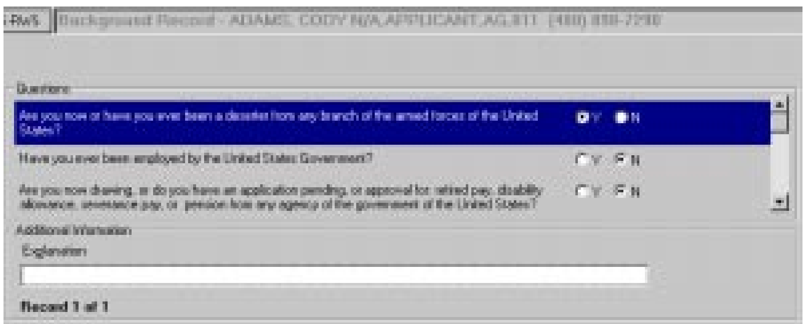
11-7. Background folder.



a. Now let's go on to the next section by clicking on the **ARISS-RWS** tab and then on **BACKGROUND**. Open the **BACKGROUND** folder by clicking the plus sign next to it. Let's work on the **Investigation Record** first.

b. Click on **Investigation Record** and review the questions on this screen that you'll need to obtain answers for. We have filled in the **Y** (Yes) answers for you to show the additional information required. If your applicant is a male born after December 31, 1959, you will need to answer the additional questions involving the **Selective Service Record**. When you finish the **Investigation Record** you are ready to **Save** this information and go to the **Background Record**.

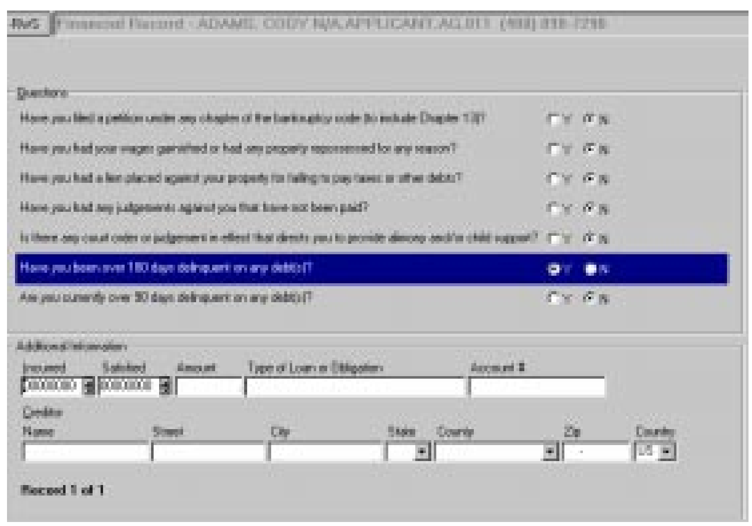


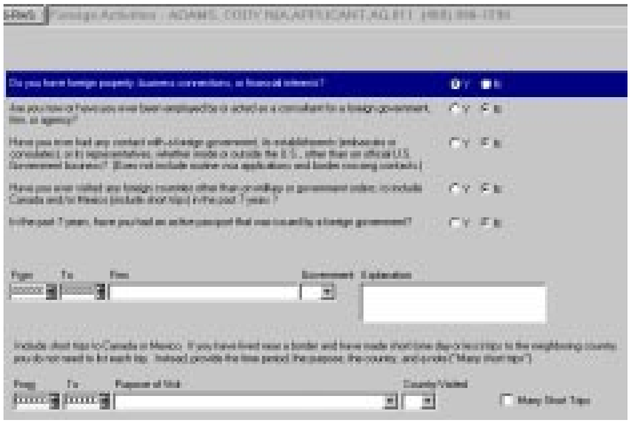


c. Click on the **ARISS-RWS** tab and then click on **Background Record**. Review the questions on this screen. Those questions that are answered **Y** (Yes) will require a further **Explanation**. Remember this information is required to complete the security clearance application. Use the scroll bar until your applicant has answered all of the questions listed on this screen. When you are finished, **Save** the data and go to the next screen.

✔It's important that you familiarize yourself with the questions on these and the other screens. Your applicant may not be able to provide all of the information for a specific question and you may have to return at a later date to complete that section.

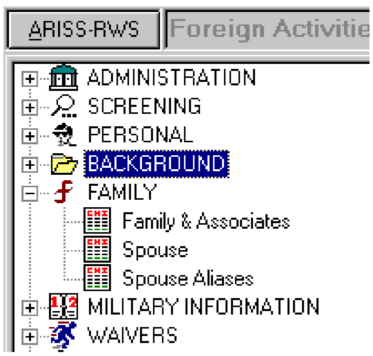
d. You've now finished the **Background Record** so let's move on to the **Financial Record**. Click the **ARISS-RWS** tab and then click on **Financial Record**. There's only one page of questions regarding the recruit's financial record. Review the questions on this page and remember, if the applicant answers **Y** (Yes) to any question, there will be additional information required.



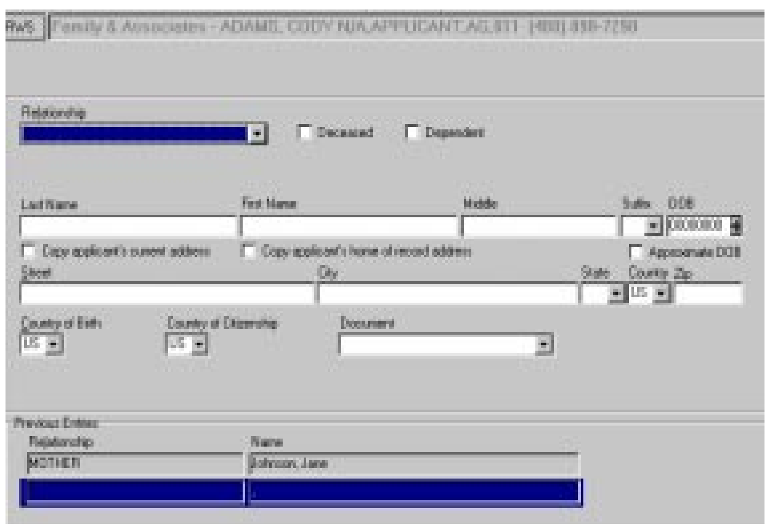


e. Now **Save** your work and go to the next screen, **Foreign Activities**. Click on the **ARISS-RWS** tab and then click on **Foreign Activities.** Take a minute to review the questions. It's important that your applicant understands and accurately answers each of the questions. Remember if your applicant answers **Y** (Yes) to any question, there will be additional information required. Now **Save** your work. You have completed the **BACKGROUND** information screens.

11-8. Family folder.

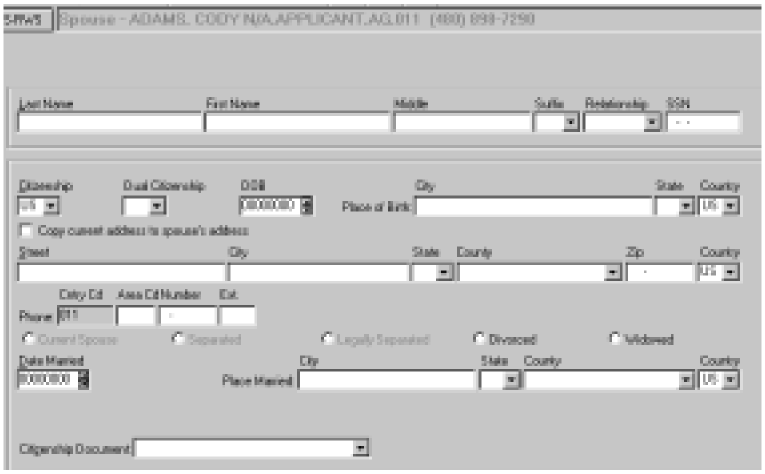


a. You only have a few more sections to complete and then you can print the applicant's enlistment packet. To go to the next section, click on the **ARISS-RWS** tab. The next section to complete is **FAMILY**. There are three screens that need to be completed under **FAMILY**. Let's start with the first one, so click on **Family & Associates**.

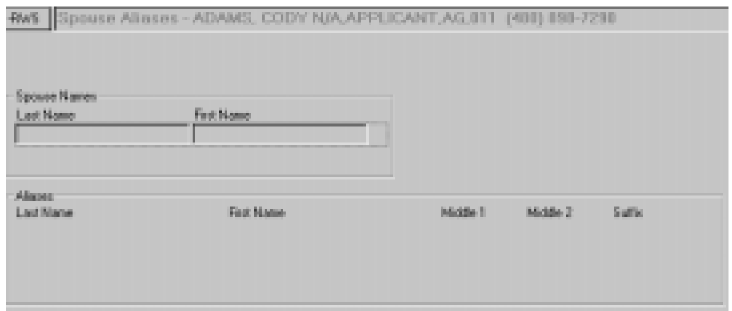


b. Start by clicking on the **Relationship** drop-down arrow and selecting a relation. When you select **MOTHER**, another box will appear asking the **Mother's Maiden Name**. Do not enter the spouse on this screen. There is a separate screen for the spouse's data. If the family member has the same address; either the applicant's current address or their home of record, you can check one of those boxes and it will automatically populate the address information. We've entered Cody Adams' Mother's information and Saved it. But you now need to enter the other family members. Once you have saved the information you need to click on the **Add** or **Insert Row** icon to enter another record. Continue entering the family member information. If any of the family members has a **Country of Birth** or **Country of Citizenship** other than US, additional screens will appear. You will need to complete the additional information and when finished click **Save**. Once you complete the **Family & Associates** screen, **Save** your information and move to the next screen.

c. Click the **ARISS-RWS** tab and then click on **Spouse**. This screen and **Spouse Aliases** is required only if the applicant is now or was previously married. Look over the information you'd need to fill in for an applicant who has a spouse. If you do not enter any data, you do not have to **Save**, just click the **ARISS-**

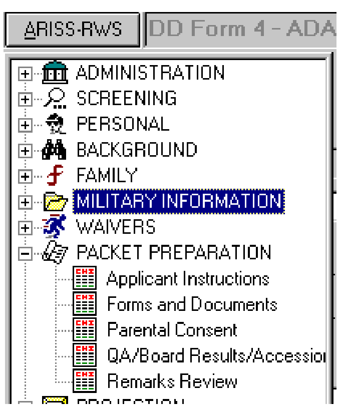


RWS tab. Let's check out the information needed in the **Spouse Aliases** screen, even though your applicant doesn't have a spouse. Click on **Spouse Aliases**. Notice the section is subdued. If you had entered a spouse, you'd be able to access these windows. Again, you don't need to **Save** because you didn't update this specific record. We have completed the **FAMILY** screens.

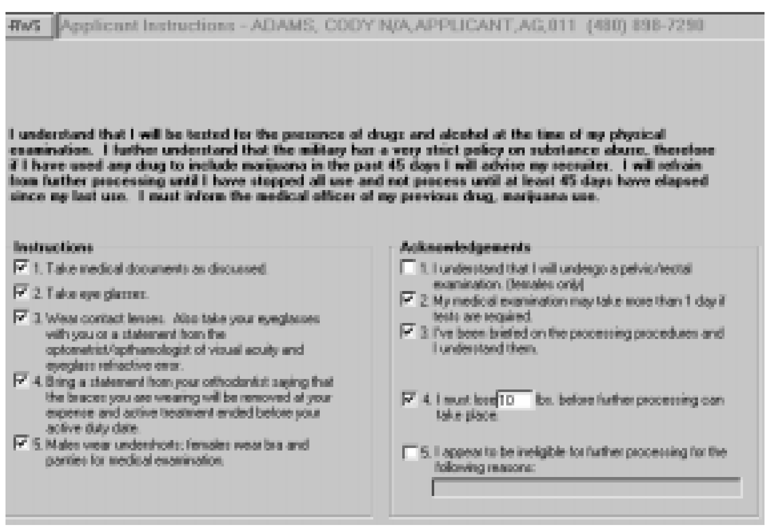


✔ Click the **ARISS-RWS** tab. For those screens that were completed in total, you should see a red checkmark beside that screen title.

11-9. Packet Preparation folder.

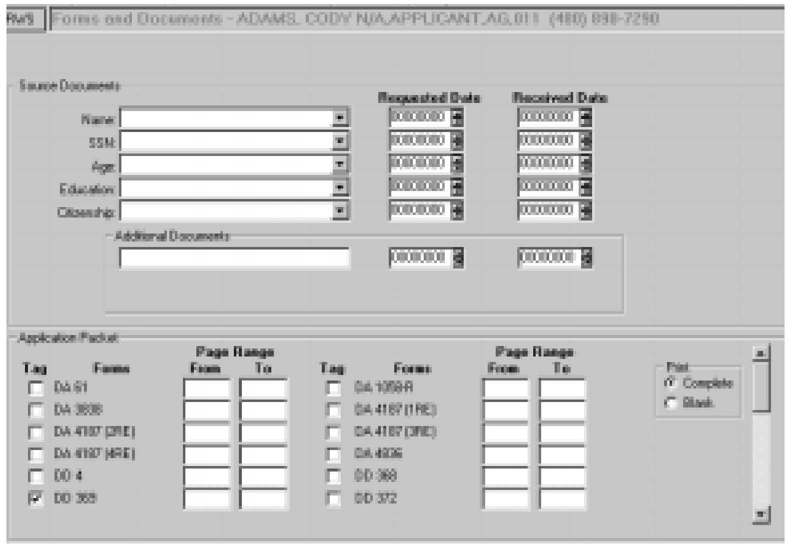


a. Now we are ready to start putting the paper packet together. First, minimize the **FAMILY** section by clicking the **minus sign** just to the left of **FAMILY**. Now go ahead and open the **PACKET PREPARATION** section by clicking the **plus sign**.

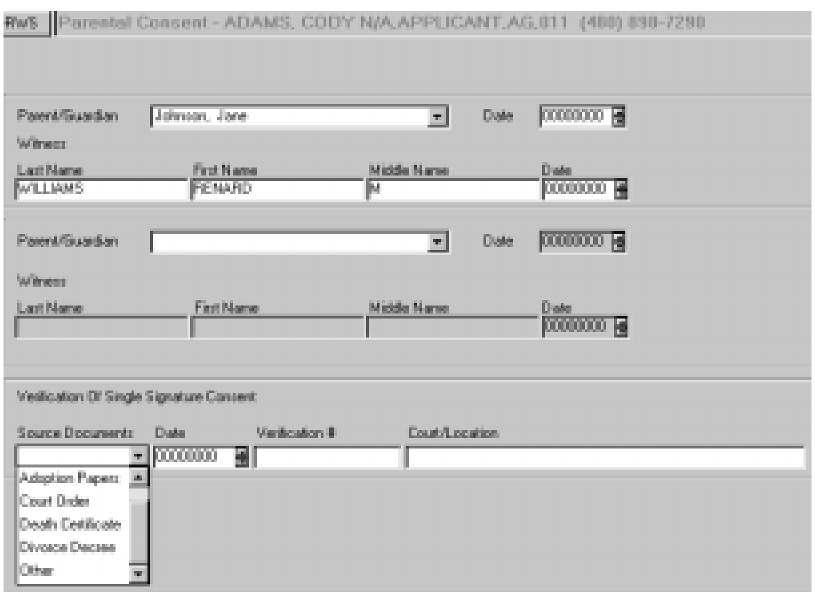


b. Click on the **Applicant Instructions** folder. Take a moment to read the information on this screen. You should be familiar with it. Brief your applicant on the data and check all statements that pertain to your applicant's processing. Now **Save** the file.

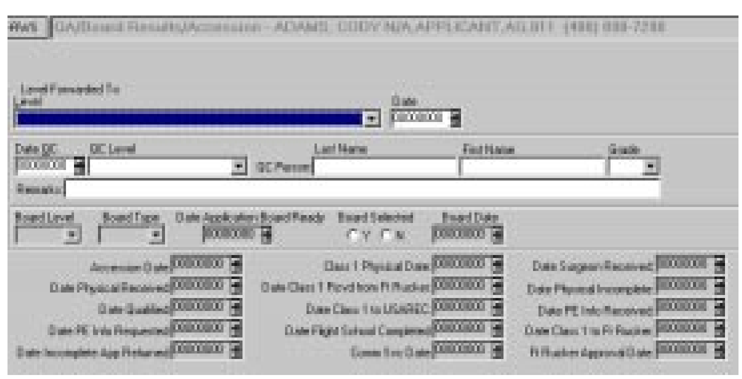
c. Exit from the **Applicant Instructions** record by clicking the **ARISS-RWS** tab. Click on **Forms and Documents**. Your applicant must provide proof of **Name**, **SSN, Age, Education,** and **Citizenship**. Click the **Source Documents** name from the drop-down arrow. Take a look at some of the options your applicant has for **Source Documents**. Select the **Source Documents** that your applicant will provide to verify those above items. Once you select the **Source Document** hit the ***Tab*** key and enter the **Requested Date**. When you receive the documents annotate the **Received Date**. Review the forms listed in the **Application Packet** section. You'll see that the **DD 369** is already checked because it's a required document. As you continue to view the forms you'll note other forms already checked. Click the scroll bar down arrow. You've now reviewed all the additional forms. You can make changes and tag any additional forms that you may need. **Save** the information. If you are connected to a printer and ready to print the packet, click the **Printer**  icon or click on **File** from the menu bar and click **Print**.

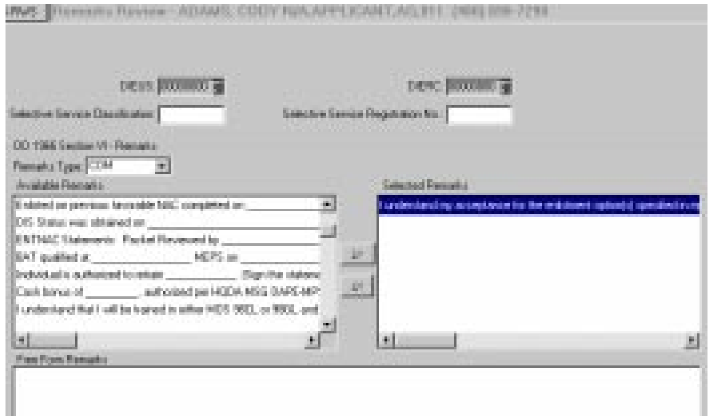


d. Once finished with **Forms and Documents** check the **ARISS-RWS** menu and see if there are any other items that you need to complete. You may need to complete the **Parental Consent** screen if the applicant is underage. Let's take a look at the **Parental Consent** screen. Review the information needed when processing someone under the age of 18. If parental consent were required, you'd be able to select the names of the parents from the drop-down arrows. You will be listed as the **Witness**, but that can be changed if necessary. If verification is coming for a single parent or guardian, you will need to have the applicant provide the source documents that you both agree upon. Enter the **Source Document** information. Once you are finished **Save** the date.



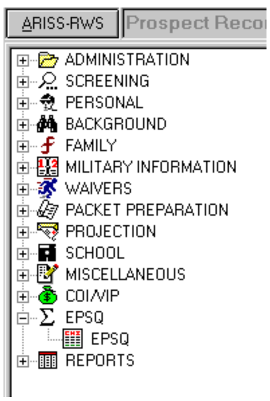
e. Let's continue to review the remaining screens under **PACKET PREPARATION**. Click the **ARISS-RWS** tab and click **QA/Board Results/Accessions**. If the applicant is an **OCS** or **WOFT** candidate, you'd be able to access this screen to record the **Board Results**. To access this screen, the Processing Option Type on the Prospect screen must be properly annotated.





f. The last item under **PACKET PREPARATION** involves the **Remarks Review**. Click on the **ARISS-RWS** tab and click on **Remarks Review** to review this screen. The **Remarks Review** allows you to add remarks to the DD Form 1966 series (Record of Military Processing - Armed Forces of the United States). This includes generic statements and a free text area for annotating comments. Currently there are no **Available Remarks** for prior service or nonprior service. If you select **COM** from **Remarks Type** you will see a list of prepared remarks. To select a remark to be printed on the DD Form 1966 series, click on the remark and then click on the greater than arrows in the center of the screen. You can enter specific remarks for an applicant's DD Form 1966 series by typing the information in the **Free Form Remarks** field.

11-10. EPSQ folder.

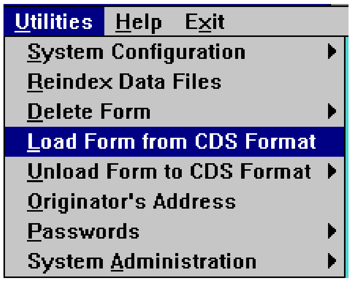


a. Since we have completed entering the applicant's information you need to complete the **EPSQ** application. You will need to validate the information that you've added in all of the previous screens. This information is used to perform background checks on all applicants. Click the **EPSQ** folder and then click on the **EPSQ** icon to launch the Electronic Personnel Security Questionnaire (EPSQ) application.

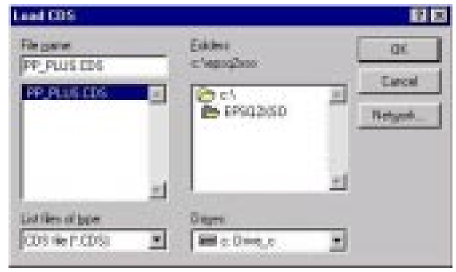
b. When you click **EPSQ**, you'll see an information box. Wait for the validation to finish reading the data. If an **EPSQ Validation Failure** screen appears, go to the identified screens and fields and make the corrections and then try again. If there are no errors found during the validation process, the EPSQ application will open to the **Login** screen.

c. If this is the first time you are accessing the **EPSQ** application you will see a dialog box for **Add Security Officer**. This is nothing more than creating a new login ID for the application. If you need to **Add Security Officer**, fill in the windows, ensure **Admin Status** is checked **Yes**, and then click the **OK** button.

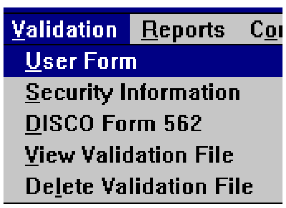
d. If not, the **EPSQ** main screen will appear and you will be prompted to enter your **User ID** and **Password** and then click **OK**.



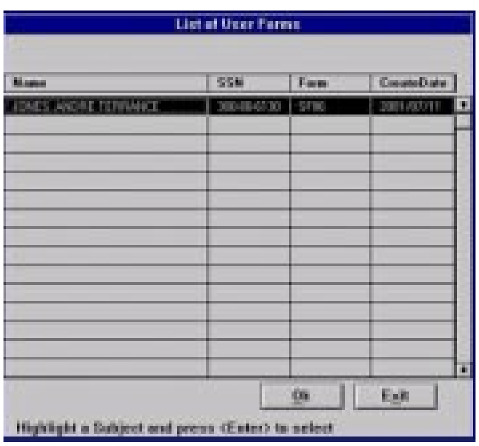
e. After logging in, you need to load the proper form from the CDS format. So click on **Utilities** on the menu bar to continue and click **Load Form from CDS Format**.



f. An information box appears showing the available form. Select the file called **PP_PLUS.CDS** and then click **OK**. You'll see an information box showing the different information being loaded.



g. After the form is loaded you will see the **EPSQ** main screen. You now need to validate the user form. So click on **Validation** on the menu bar and then click on **User Form**. When you click **User Form** on the **Validation** menu, this information box appears. If you know the Subject's SSN, you can enter it and click **OK**, or you can select your subject from a list of users. To see this list, click the **List Users** button.

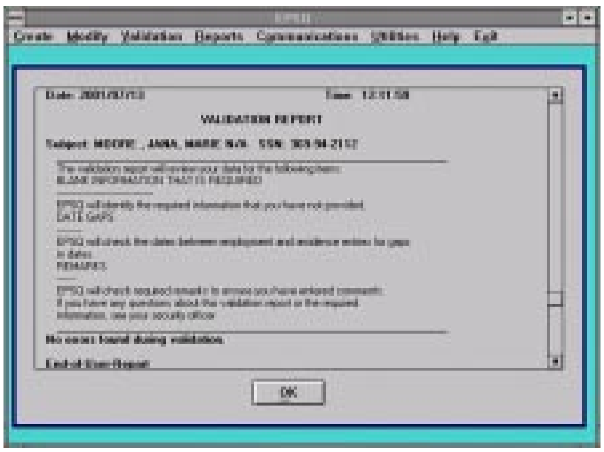


h. Click on your applicant's name from the list of users and then click **OK**. This information box appears while the form is being validated.

i. If no validation errors are found, this information box appears. Use it to select a report output option. In this case, you want the report formatted for output to a printer. Click on **Printer** and then **OK**. This will print the validation report to be included with the EPSQ User Form.

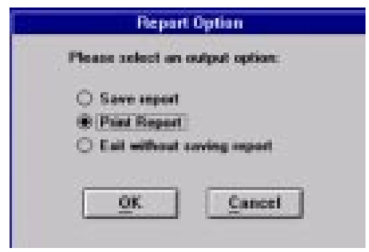
j. If errors are found, when you click either the **Printer** or **Screen** button, another screen will appear indicating the errors that need to be corrected. You will need to go to **Modify** from the file menu and click on **User Form** to make the modifications. Once you corrected the data you will need to follow the above steps to revalidate the form. If you do not know how to modify an EPSQ application go to the end of this chapter for assistance.

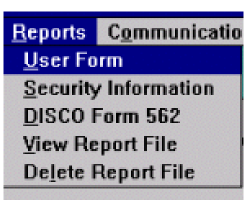
✓ You will need to provide your MEPS GC with a printed copy of the Validation Report showing zero errors and a printed copy of the User Form, so have your laptop connected to your printer.



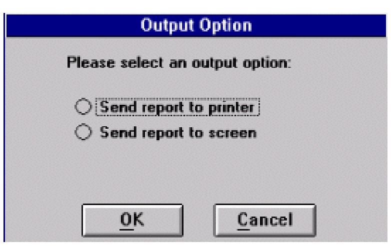
k. If you selected **Screen** and clicked **OK**, a window would appear showing how the **Validation Report** will look when printed. Click the **OK** button to continue.

l. At this point you need to print the Validation Report. Click the **Print Report** button and then select **OK**.



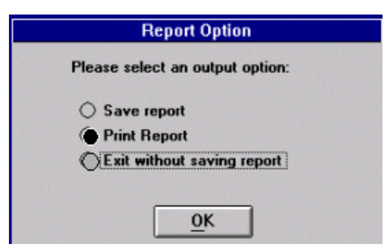


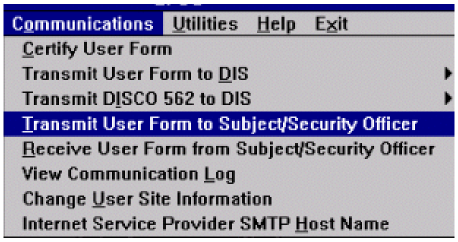
m. Now, you will need to print the EPSQ **User Form**. Start by clicking on **Reports** on the menu bar and then click on **User Form**. Once you click on **User Form** an information box appears. If you know your **Subject's SSN**, you can enter it and click **OK**, or you can select your subject from a list of users. To see this list, click the **List Users** button. Select your applicant off the list and then click **OK**.



n. Now it's time to select an **Output Option** for the report. You will need to select **Send report to printer** and click **OK**.

o. If you selected **Send report to screen** a screen showing the complete report would appear for review. Once you click on **OK**, a **Report Option** box will appear asking you to select an output option. Click **Print Report** and then click **OK**. You will need to follow these steps to print the EPSQ **User Form** to give to the MEPS GC.

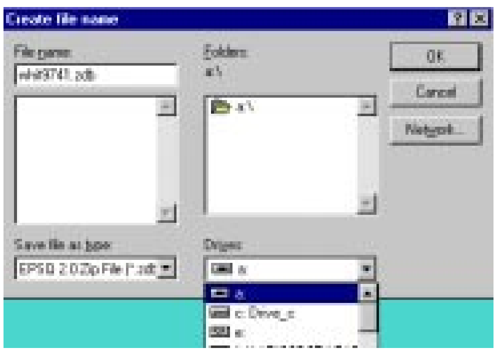




p. Once the report is printed, you now need to save the file to a 3-1/2" floppy disk to include with the printed User Form. To save the report to the floppy disk, click on **Communications** on the menu bar. Now click on **Transmit User Form to Subject/Security Officer**.

q. An information box appears for you to create the file. You will fill in the **File name** window with the name you want for the exported report. The standard file name will consist of the first four letters of the applicant's last name combined with the last four digits of his or her SSN. This naming standard is a good way to keep track of reports.

✓Remember to take out the asterisk " * " when entering the file name. The file name can only be eight digits.

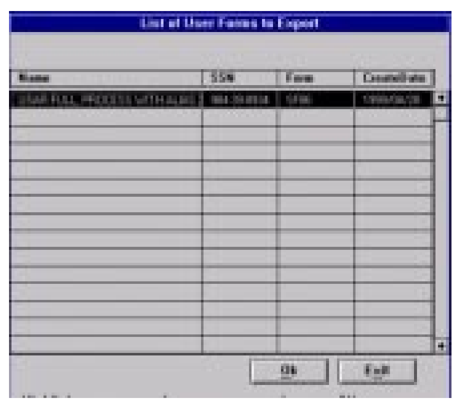


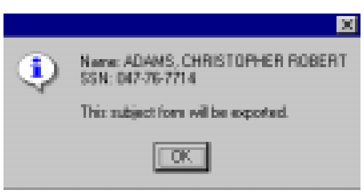
r. Next, you want to select where to save the EPSQ **User Form**. To save on a 3-1/2" floppy disk, you have to select the **"a"** drive. So click the drop-down arrow for the **Drives** and click on the **a:** drive.

✓Remember that before you switch to the "a" drive, you need to insert a disk.

s. Now that you have the correct file name and drive selected, check to ensure the **Save file as type** is displaying **EPSQ 2.0 Zip File (.zdb)**. It should default to this file type, but you may need to select from the drop-down arrow if something different is showing. Now click **OK** to continue saving your file.

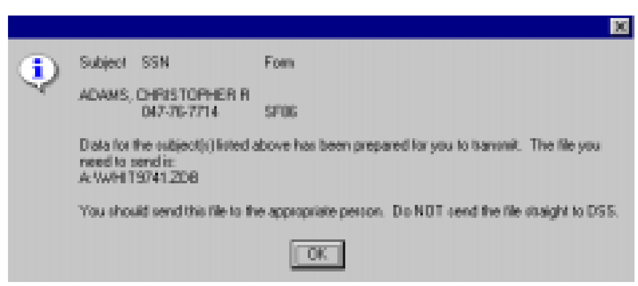
t. A screen will appear showing the **List of User Forms to Export**. It will show the applicant's name and SSN so you can confirm that you're exporting the correct report. Highlight the applicant and then click **Ok** to continue.





u. An information box appears requiring you to verify the file being exported. Click **OK**.

v. Another confirmation box appears informing you that the file is ready to transmit. It should show the drive, file name, and the correct **.zdb** file extension. If this is correct, click the **OK** button to continue.

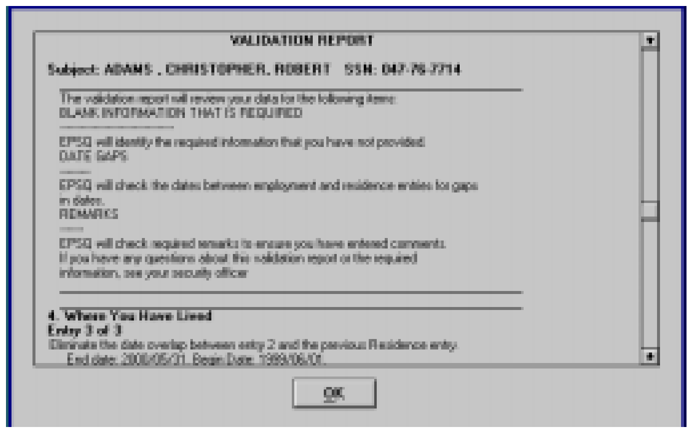


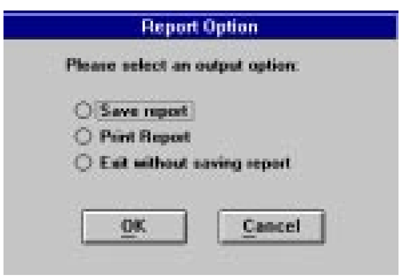
w. Remove the 3-1/2" floppy disk and include it with the printed documents to be given to your

MEPS GC. Go ahead and exit **EPSQ** by clicking on **Exit** on the menu bar and then **User Logout**. To close the **EPSQ** application, click **Exit** again and then **Quit EPSQ**.

x. The EPSQ application was designed and developed by the Defense Security Service. The ARISS-RWS Leads-Reports application was designed to take the information you entered and copy it to the appropriate fields in the EPSQ. There may be times you did not receive a validation error from the ARISS-RWS Leads-Reports application, but you will get a validation error in EPSQ. We mentioned earlier that you would have to modify the EPSQ application to eliminate those validation errors. The next few steps will show you how to modify the application. Once you have completed the modification, you will need to revalidate and print the Validation Report showing zero errors and print the User Form Report. Do not turn in an incomplete or nonvalidated report to your MEPS GC. It will only slow down your applicant's processing.

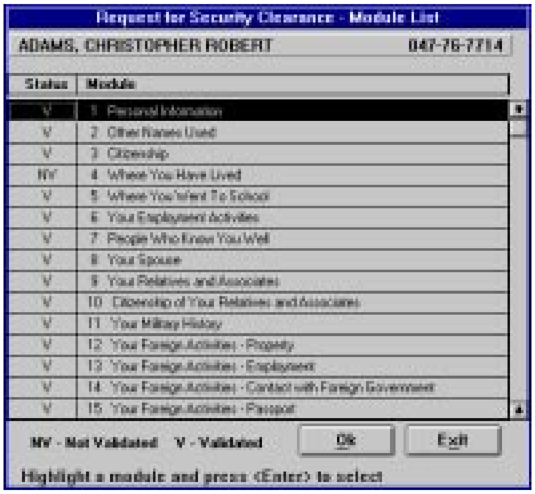
y. To modify an **EPSQ** application you will need to know what error was found. When the **Validation** screen appears identifying an error, click on **Screen** and then click **OK**. Scroll down until you see the error message. The message will be very specific as to what item was found in error. Click **OK** to continue.





z. You will be given an option to **Save report, Print Report,** or **Exit without saving report**. If you only had one error, this will be easy to remember, so click **Exit without saving report** and click **OK**. If you have several errors to correct, recommend that you select **Print Report** and then click **OK**. This will give you a reminder of the different errors found during validation.

aa. Now you will need to click on **Modify** from the menu bar and click on **User Form**. Once you click on **User Form** an information box appears. If you know your **Subject's SSN**, you can enter it and click **OK**, or you can select your subject from a list of users. To see this list, click the **List Users** button. Select your applicant off the list and then click **OK**.



ab. The **Module List** will appear identifying the status of the different modules. Review the list for the **Modules** that have a **Status** of **NV**. Highlight the **Module** that has an **NV** Status and then click **Ok**. This is where your memory is either good or bad. Either way you will need to review that **Module** and make the correction. Once you have made the correction, **Exit** the **Module List** and revalidate the report. You should receive a **Validation Report** showing zero errors and can continue completing the EPSQ application.

ac. Over the past couple of years, we have identified a few areas that may cause you problems with getting your applicant's EPSQ application completed. The known problems are listed below:

✓ The first question of module five of the EPSQ application asks, "Have you attended school beyond Junior High School within the last 5 years." When the EPSQ is printed the form asks for the last "10 years." The application has the correct question and the printed form is wrong. Per the Defense Security Service hot line you must line through the 10 and enter 5 on the form.

✓ If the applicant doesn't know who his father is and entered "unknown" in ARISS-RWS Leads-Reports but it still errors off in EPSQ. The solution is to enter UNK for the father's first name. This is in module 9. When you do this the following message appears: "Since you do not know the name of this family member, no other information is required. Press OK to move to the next screen."

✓ EPSQ is showing validation errors in different modules and when you go to modify to check the information, they find that the data is there. If the information is there, use the Enter key and go through all the fields and then revalidate the application.

✓ EPSQ is showing a validation error on the employment module with an error message that employment must go through present. This is a known problem with EPSQ accepting an applicant that is currently working two jobs at the same time. Only one job can have a present date and all others must show an actual TO date on the record. You can make the correction in ARISS-RWS Leads-Reports or EPSQ.

✓ Accessing EPSQ and a message appears stating you are already logged in and shows only an OK button. This occurs when your login account has not been set up properly with ADMIN Status checked NO. Contact your Rctg Bn IMS and have them login and change your ADMIN Status from NO to YES.

✓ Accessing EPSQ and a message appears stating you are already logged in, do you still wish to login, and shows a Yes or No button. This happens when you fail to logoff and then exit EPSQ. Hit the Yes button and continue processing your EPSQ packet.

✓ You cannot get the record to save to a disk after completing and printing the EPSQ packet and validation sheet. Attention to the drive selection is necessary to ensure the file is being saved to the "A" drive and that the file name is only eight characters. In most cases, the file name is showing nine characters with an asterisk " * " being the ninth character.

✓ EPSQ is showing a validation error stating the history must start at the beginning of the investigation scope. The start date for employment, references, residences, etc., must go back 7 years or to the applicant's sixteenth birthday. This should be corrected in ARISS-RWS Leads-Reports and sent back through to correct this problem in EPSQ. However, you can make the correction in EPSQ. Remember that the beginning of the investigation scope is 7 years prior to their sixteenth birthday.

✓ EPSQ is showing a validation error on the references module with an error that the country name cannot be blank. This error occurs when you list a reference with a foreign address. The question in ARISS-RWS Leads-Reports is for three people who know you well and live in the US. Ensure all references have a US address.

Chapter 12

Submit and Track Waivers

12-1. General.

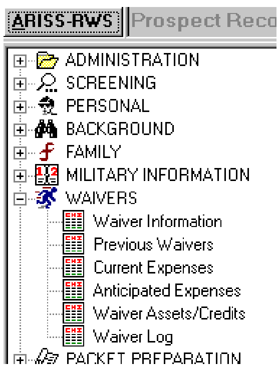
a. We are going to discuss how to submit and track waivers using the ARISS-RWS Leads-Reports application. Being able to correctly submit waiver information is critical for your applicants' processing. This system was not created to submit waivers for you, but used to track the status of the waivers you have submitted. You are still required to submit the waiver documentation through the chain of command, but you will be able to track waivers from the time you submit them until they are approved or disapproved. You'll no longer have to call and get updates from the 1SG on the status of your waivers.

b. The following steps will show you how to create and track a waiver:

(1) Complete waiver request.

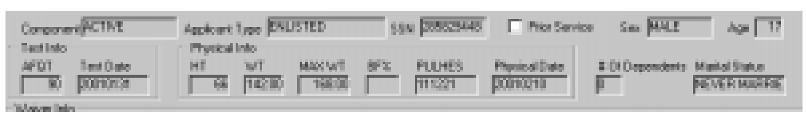
(2) Additional information for dependency waiver.

(3) Track the waiver progress.

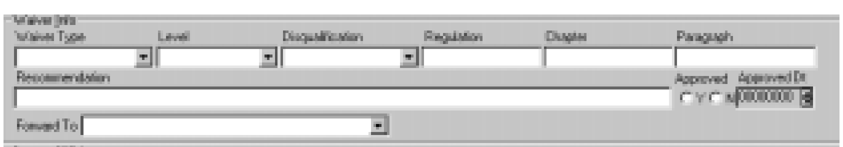


c. To submit and track a waiver, opened the record of the applicant who requires a waiver. Once the record is opened to the **Prospect** screen, click on the **ARISS-RWS** tab and click on the **WAIVERS** folder. Now click **Waiver Information**. You will see that the screen is basically in three parts consisting of some basic applicant information, waiver information, and approval history.

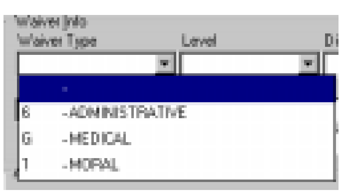
12-2. Complete waiver request.



a. This basic applicant information will automatically populate from the applicant's record.

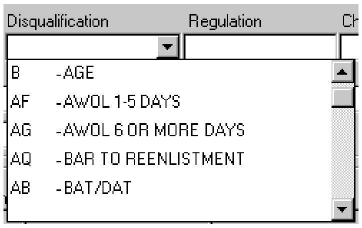


b. You will be required to complete the following fields identifying the waiver you are submitting.



c. Click the **Waiver Type** drop-down arrow to select the type of waiver you are submitting. You need to determine the waiver information by using the appropriate regulations.

d. Now click the **Level** drop-down arrow. This is where you will identify the approval authority for the waiver you are submitting. Review the appropriate regulation if you are not sure who the approval authority is.

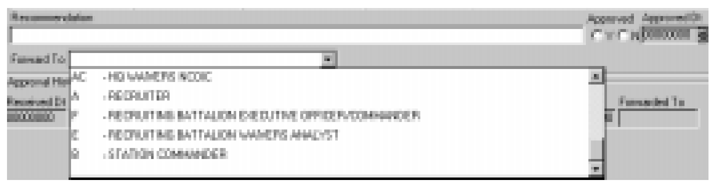


e. Click the **Disqualification** drop-down arrow and review the different selections. You will select a disqualification code based on the appropriate regulations, just as you did for the Level.

f. You must site the **Regulation, Chapter,** and **Paragraph** defining the waiver. You can get this information from AR 601-210 and other regulations.

✔Remember that the information you are entering on this screen should match the actual waiver packet that you are submitting through the chain of command.

g. You will need to type your recommendation and make a selection for the **Approved** section. From the **Forward To** drop-down arrow select the next level in the chain of command that will review the waiver. Take a minute to look at the various persons you can forward your waiver request to. In most cases you will forward the waiver to your SC.



✔Remember your approval recommendation does not mean the waiver is approved. The waiver can only be approved or disapproved by the approving authority.

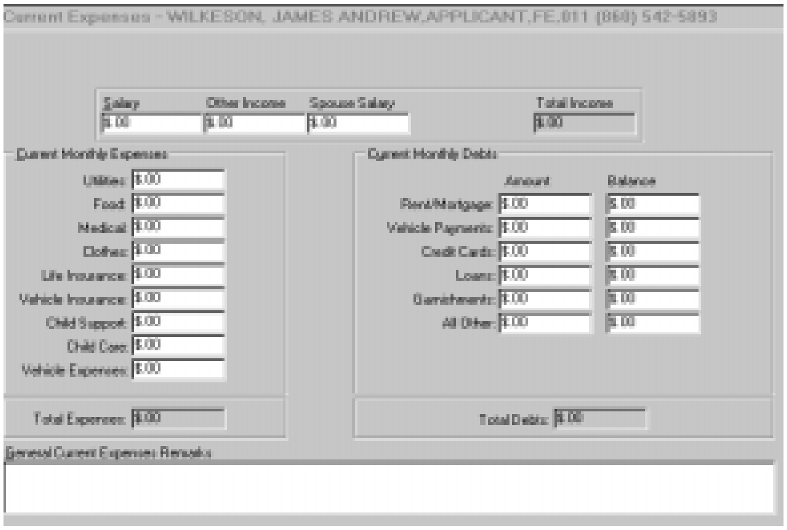
h. Now save your work by clicking **File** on the menu bar and then click **Save** or just click on the **Save** icon.

i. Now that you've saved the Waiver Info, your actions and comments can now be seen in the **Approval History**. As it travels from one level of command to the next, the information will update. Your chain of command will see the waiver request when they access the TOS. After they have reviewed the packet you submitted, they will access the TOS and record their comments and approval or disapproval. You'll receive these updates after you replicate.

j. Now that you have completed the waiver screen, there may be times that you have to submit multiple waiver requests on one individual. To check the status of a previous waiver click the **ARISS-RWS** tab. Under the **WAIVERS** folder, click **Previous Waivers**. This is a read-only screen and will only show previous waivers on the individual and the approval or disapproval status. An example would be if your applicant requires a medical waiver to be qualified for enlistment. The medical waiver will have to be approved prior to submitting a moral waiver.

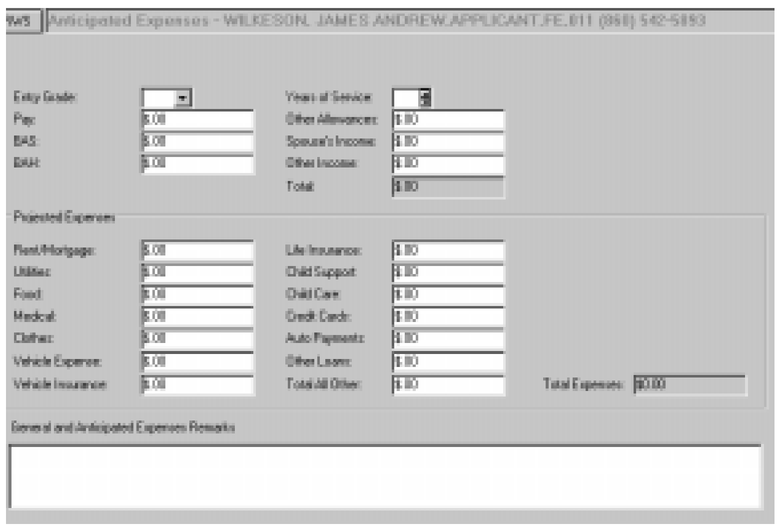
12-3. Additional information for dependency waiver.

a. For those dependency waivers there are two other screens that you need to complete. First, you're going to enter **Current Expenses** and then **Anticipated Expenses**. To access these screens click the **ARISS-RWS** tab and click on the **WAIVERS** folder. Now click on **Current Expenses**.

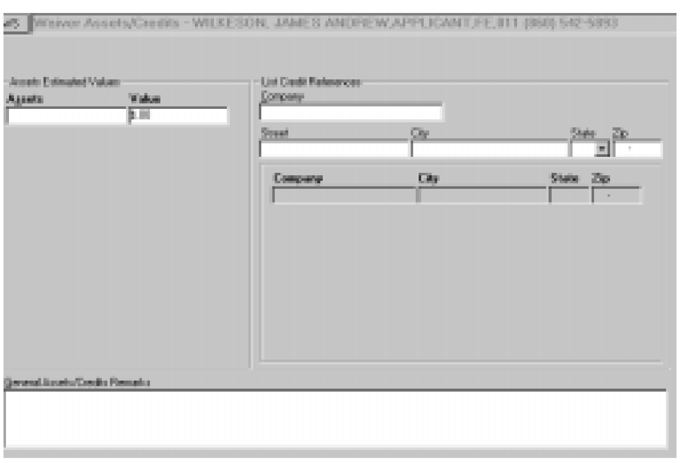


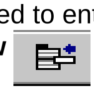
b. As you can see, you'll need to type the expense information in the record. Once you have completed entering the expenses you can add anything in the **Remarks** block that may help explain the current financial status of your applicant. Now **Save** this information and enter the **Anticipated Expenses** information.

c. Click the **ARISS-RWS** tab and then click on the **WAIVERS** folder. Click on the **Anticipated Expenses** icon. Just as you completed the current expenses, enter the appropriate information to the screen. The **Anticipated Expenses** you will enter are based on the applicant's expected pay while in the Army. Notice in the **Remarks** section additional comments can be entered that can help make a case for your applicant to be accepted as a viable new recruit.

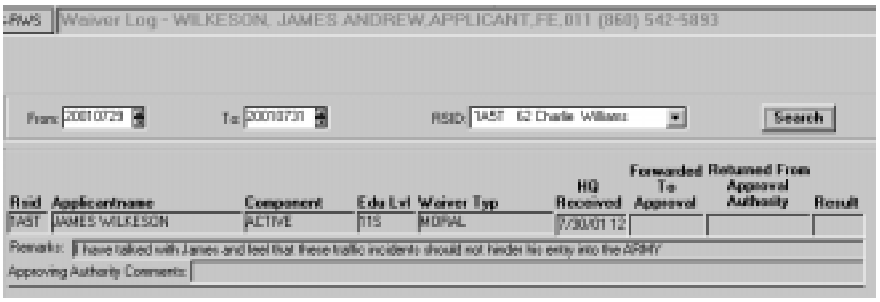


d. Now **Save** this information. You will need to complete the last screen for the dependency waiver, which includes entering **Waiver Assets/Credits**, and updating the **Waiver Log**.



e. As you have done before, click on the menu items until you find **Waiver Assets/Credits** under the **WAIVER** folder. **Assets** are items that are the current assets owned by the applicant. For example, items such as cars, homes, stocks, and bonds should be entered as assets. If you need to enter another entry, click on the **Add Row**  icon. Also on this screen you need to **List Credit References**. In the **General Assets/Credits Remarks** area you would enter any information concerning the applicant's current credit status.

12-4. Track the waiver progress.



a. Once you have completed this screen, **Save** your information and go to the **Waiver Log**.

b. Where the Previous Waivers screen showed the approval or disapproval of a submitted waiver, the **Waiver Log** is used to show all submitted waivers during a specified time. This log will show approved, disapproved, and pending waivers. This is a read-only screen. You need to enter any dates that you want to find out about and the select your name from the **RSID** drop-down arrow. Click the **Search** button to find the waivers you have submitted during the timeframe.

✔ When you complete and save one of the waiver screens, you will see a red checkmark indicating the screen has been completed.

c. Once the waiver request is sent from one level of command to the next level and that level annotates their actions on the TOS, the information in the fields will update when you replicate. With your chain of command annotating their approval status from the TOS, you can track the progress of the waiver until it is approved or disapproved by the approval authority.

d. Once you close the **Waiver Log**, you will be returned back to the ARISS-RWS main screen.

Chapter 13

Create A New COI/VIP Record

13-1. General.

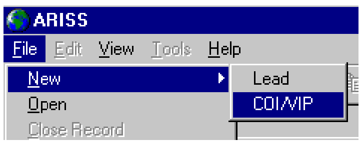
a. The COI/VIP screen will help you log individuals who provide you with referrals or have access to resources that help in your recruiting efforts.

b. The following steps will show you how to create a centers of influence (COI) record and a very important person (VIP) record:

(1) Reason for COI or VIP record.

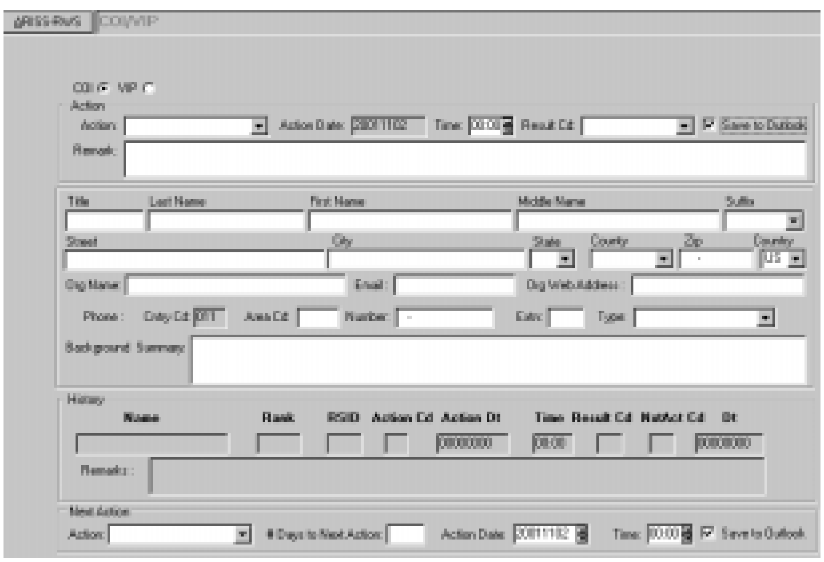
(2) Record today's action.

(3) Complete COI or VIP required information.



c. Your first task is to locate the COI/VIP screen. Click **COI/VIP** under **New** in the **File** menu.

13-2. Reason for COI/VIP record. A COI is anyone in your market area that can influence someone making a decision to join the military, such as a hiring manager at a local store. A VIP is someone who can help in your recruiting efforts such as the town mayor. The mayor would be able to get you exposure by inviting you to participate in community events such as a parade. Think about the people you meet and try to distinguish between the two categories as to how you would enter their information.

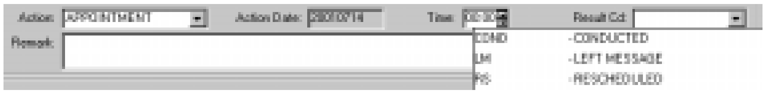


This is another screen that the **Save to Outlook** box was added. Anytime that you record an **Action** or **Next Action**, check this box and let it update your MS Outlook calendar.

13-3. Record today's action.

a. The information you need to enter for each of the categories is exactly the same, although you want to be sure to place each person into the right area so when you run a report you get the information you are looking for.

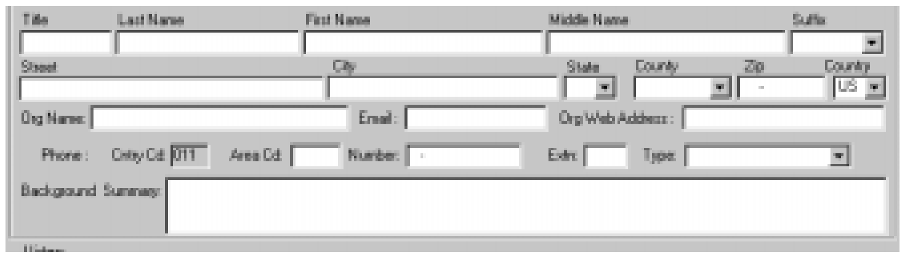
b. First select an **Action** that represents the contact you are having with the individual today. Let's take a look at some of the options. Click the **Action** drop-down arrow. You met with the individual, so click **APPOINTMENT**. Notice that the **Action Date** is filled when you initially opened the record and is now subdued. You cannot change this date, but you must enter the **Time** the appointment took place.

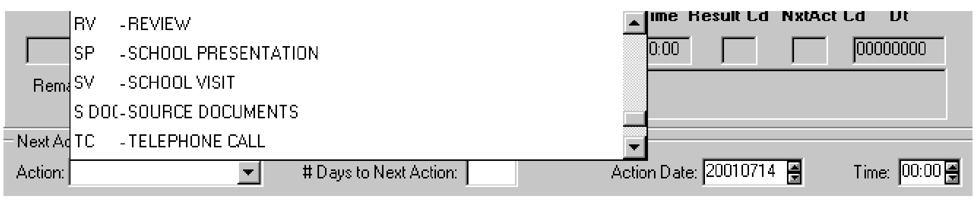


c. Now you need to enter the results of your appointment. Begin by clicking the **Result Cd** drop-down arrow. Remember the options that you get for a **Result Cd** are directly related to the information that you entered for an **Action**. You conducted an appointment so go ahead and click **CONDUCTED**. In the **Remark** section summarize the details of your appointment.

13-4. Complete COI/VIP required information.

a. Now you need to provide information regarding whom you had your appointment with. The information required here is fairly standard and will be an excellent reference for you in the future. During your conversation with Mr. Jackson, he provided you with a great deal of information on his background. It is important to take "mental notes" of these pieces of information because they can come in handy during future conversations. The fact that he was the Principal at Shaker HS could mean that he knows other people that he would be willing to introduce you to. Mr. Jackson is also an Army veteran and active in his local Veterans of Foreign Wars. He is a great contact for you to have and is in a position where he definitely is a COI and you want to ensure you keep in contact with him. So let's schedule a **Next Action**.





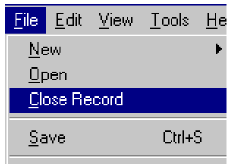
b. Click the **Action** drop-down arrow. Let's set up a time to telephone Mr. Jackson next week. Click the **Action** scroll bar down-arrow and select **TELEPHONE CALL**. You need to become familiar with the other action items listed. The application will default the **Action Date** to today's date; however, you may change this date to accommodate your scheduling. Now you'll need to select a **Time** for the telephone call. Click the ***Tab*** key on your computer keyboard to move from the **Action Date** to the **Time** window. When you hit your ***Tab*** key to enter a time, the system automatically inserts the **# Days to Next Action** for you.

✔ If you start checking the **Save to Outlook** box, you will find that your electronic mandex will be a better tool for managing your time and easier to maintain.

c. All that is left is to save this information. Click **File** on the menu bar and click **Save** or you can just click on the **Save** icon. 

d. Notice now that you have saved your information, you can see it in the contact **History** for your COI or VIP.

e. Now close the record by clicking on **File** on the menu bar and finally, click **Close Record**. You will notice that when you open the **Find** screen the action you scheduled for Mr. Jackson will show under scheduled activities.



f. You will want to continue entering any COIs or VIPs that you encounter during daily prospecting. They will be a great source for leads and can be an influence for those that you may be having a hard time selling.

Chapter 14

Maintain A COI/VIP Record

14-1. General.

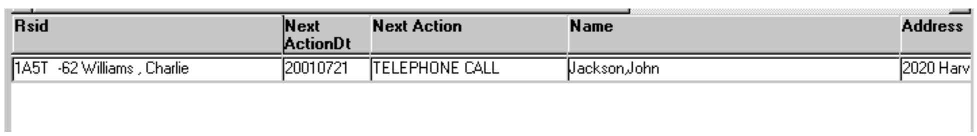
a. Since you already created your COI and VIP records and scheduled future actions, you need to continue the rapport you have established. You will need to enter information about followup calls on their COI or VIP record.

b. The following steps will show you how to maintain a COI or VIP record:

(1) Locate scheduled appointments.

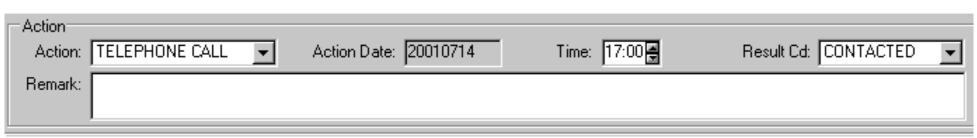
(2) Record today's action.

14-2. Locate scheduled appointments. To accomplish this you first need to understand that the **Find** screen will show those dates and times that you have scheduled to contact your COIs and VIPs. When you opened your **Find** screen this morning you noticed that you scheduled a telephone call with Mr. Jackson. Notice the bottom half of the **Find** screen is an area listing **Next Action** to be taken. This is the activity area of the **Find** screen. In this case, you completed the telephone call to Mr. Jackson. So you would select that line on the **Find** screen. Now, to go to the **COI/VIP** screen relating to the selected line, click the **OK** button. This will bring up the **COI/VIP** screen for Mr. Jackson.



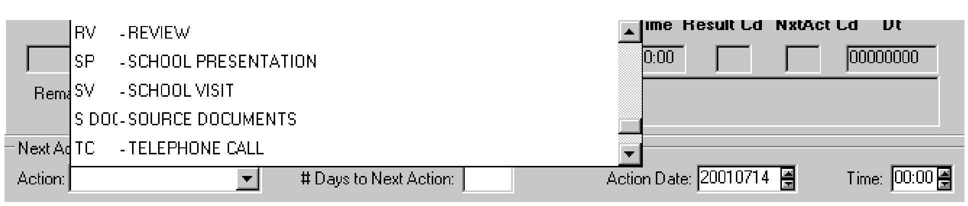
14-3. Record today's action.

a. You'll need to enter information in the **Action** area about your followup telephone call. Notice that **TELEPHONE CALL** already appears in the **Action** window. That window automatically populates with what was entered as the **Next Action** the last time this screen was accessed. The current date and time also appear in the **Action** area. The date cannot be changed. However, you should change the time to when you actually made the telephone call. Now, you need to enter the **Result Cd** of your telephone call. To access the list of results, click on the drop-down arrow for the **Result Cd** window. You want to enter that you **CONTACTED** Mr. Jackson. The final window in the **Action** area is the **Remark** window. Use the **Remark** window to summarize the details of your telephone call.

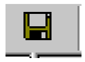


✔ If you start checking the **Save to Outlook** box, you will find that your electronic mandex will be a better tool for managing your time and easier to maintain.

b. Click on the **Action** drop-down arrow. Let's set up a time to telephone Mr. Jackson next week. Click the **Action** scroll bar down arrow and select **TELEPHONE CALL**. You need to become familiar with the other action items listed. The application will default the **Action Date** to today's date; however, you may change this date to



accommodate your schedule. Now you'll need to select a **Time** for the telephone call. Click the ***Tab*** key on your computer keyboard to move from **Action Date** to the **Time** window. When you hit your ***Tab*** key to enter a time, the system automatically inserts the **# Days to Next Action** for you.

c. All that is left is to save your information. Click **File** on the menu bar and click **Save** or you can just click on the **Save** icon. 

d. Does this sound familiar? You are doing the same thing as when you created the record. You need to make sure that you make these appointments and annotate your actions. The next time that you replicate, this information will update the TOS reports and keep your SC updated on the work that you are doing.

e. After completing an entry such as this, you should return to the **Find** screen to check what other actions need to be taken. Do this by clicking **File** on the menu bar. Now, click **Close Record**. This will take you back to the application main screen. If you want to go directly to the **Find** screen, click on **File** and then click on **Open**.

Chapter 15

Collect and Maintain School Information

15-1. General.

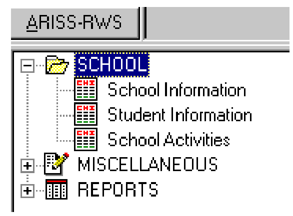
a. Within ARISS you are able to maintain records about all the schools assigned to you. Being able to collect and maintain school information is critical for your mission accomplishment. You will learn how to document and add information to your School Information records.

b. The following steps will show you how to collect and maintain school information:

(1) Locate school information records.

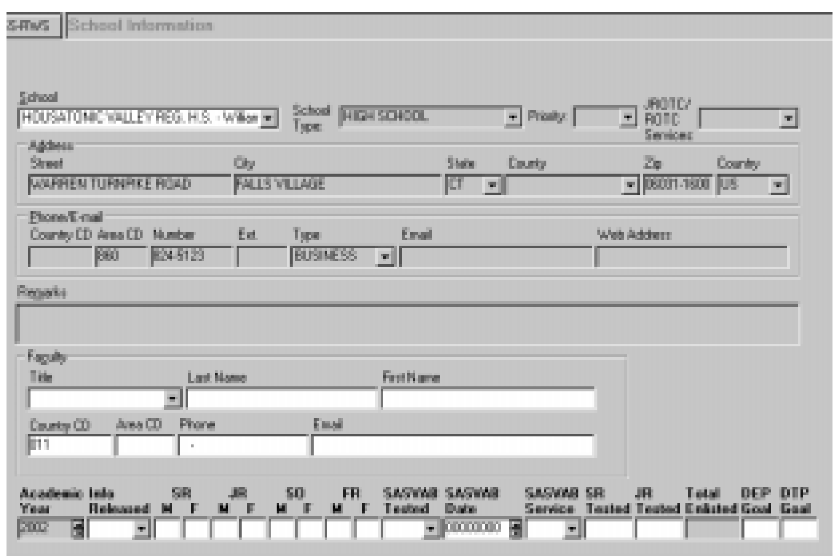
(2) Enter faculty information.

(3) Add school information.

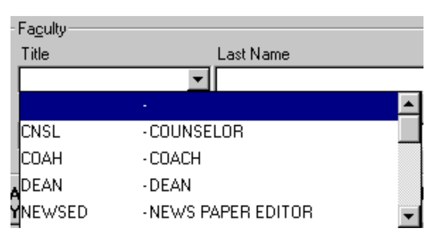


c. You first need to locate the School Information records in the ARISS application. You will find this either from the main screen or when you have a record opened. In order to access your ARISS school menu information, click on the **ARISS-RWS** tab and then click on **SCHOOL** from the menu tree. Under the **SCHOOL** menu, there are three options. We will first focus on adding information to your existing **School Information** and will discuss the other options in other chapters. You can access this by clicking **School Information** now.

15-2. Locate school information records. Take a moment to review the **School Information** record. ARISS will automatically default to the first alphabetically listed school in your ZIP Code area. The information you need regarding a faculty contact is minimal and the rewards for maintaining this contact can be essential to your HS recruiting efforts. A lead can come from anyone within a school. Teachers, deans, principals, counselors, and coaches have exposure to an entire student body and potentially, your next lead. You will notice that there are certain fields that are grayed out and you cannot make any changes. If you notice any errors contact your chain of command. These changes will need to be made in an ARISS application called Force Structure Address and ZIP Code Realignment (FAZR) at Headquarters, United States Army Recruiting Command. The other fields are available for you to add faculty and school information.



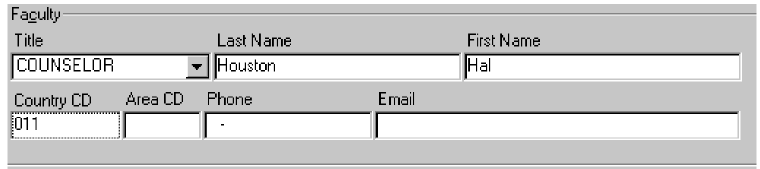
15-3. Enter faculty information.

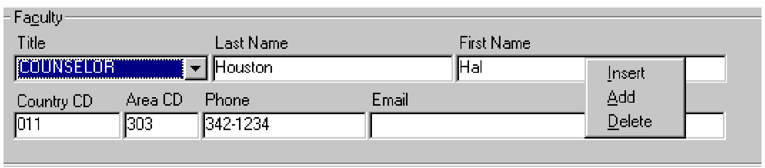


a. To add **Faculty** data, start by clicking the **Title** drop-down arrow. You can see some of the options available here. Even a **NEWSPAPER EDITOR** can be a good contact. In this example, you know they have hired a new counselor at Housatonic Valley Reg HS.

Go ahead and click on **COUNSELOR** designating the faculty member's title. Now that you've inputted the new counselor's title, you need to enter in his or her name and telephone number.

b. Notice in the **Country CD** window, there is a 011 number listed. That number is the **Country CD** for the United States and ARISS will automatically default to that number for you. However, you must type in the three-digit area code and seven-digit telephone number. Do not type a dash symbol in the telephone number, the application will automatically put one in after the third number. If you have the contact's **Email** address, make sure to enter it.



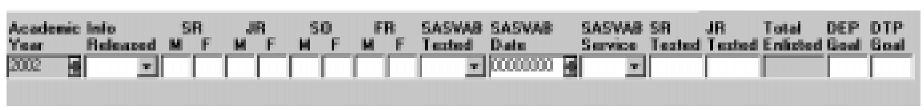


c. Once you have entered this counselor's data, you need to add additional faculty members. To do this, right click in the **Faculty** box. A box will appear allowing you to **Insert, Add,** or **Delete**. You can click on **Add** to continue with the other faculty members. Remember that you can **Delete** a faculty member when they depart. Take the time and make sure all faculty members are entered for each school. A scroll bar will appear after you have entered more than one faculty member.

15-4. Add school information.

a. School population refers to class sizes for the freshman to senior grades, whether or not they have taken the ASVAB test, number enlisted, and active duty DEP and USAR DTP goals.

b. ARISS will default to the current **Academic Year**. **Info Released** indicates if the school releases directory information to the recruiter. The system will automatically default to "Yes." However, if the answer is "No," you may click the drop-down arrow and select "No" as your response. The next set of blocks indicates the male and female population of each grade, senior through freshman. You can get this information from your school. This drop-down arrow is used to note if your school has administered the SASVAB. You can select **Yes** or **No**. If the school has tested or was scheduled to test, you will complete the **SASVAB Date** and the **SASVAB Service** which is responsible to administer the test. You can obtain this information from your Rctg Bn education services specialist. You will also complete the number of **SR Tested** and **JR Tested**. For the DEP your Rctg Co commander will assign your DEP goal. Enter this number in the **DEP Goal** field. The **DTP Goal** field refers to individuals that have enlisted in the USAR and are waiting for basic training. You will notice that the **Total Enlisted** field is grayed out. The number of enlisted will automatically populate when the status on your records change to enlisted.



c. As you enter data for the other academic years, a scroll bar will appear to the right of the screen allowing you to review current and past school data.

d. Now that you have entered all of the school faculty members and school information for your schools, all that is left is to save your work. By now you should be familiar with saving your changes, but if you are not, click on **File** on the menu bar and click **Save**. You can either click on **Close Record** to return to the ARISS main screen or click on **Open** to go to the **Find** screen.

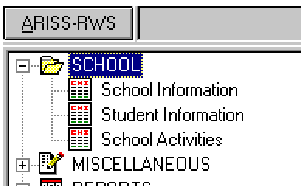
✔ Remember a list of students will be automatically transmitted to your laptop from the ARISS TOS through replication after that school has been administered the SASVAB. There is no reason to manually build these leads.

Chapter 16

Collect and Maintain Student Information

16-1. General.

a. A good reconnaissance for student information can lead you to being a successful recruiter. The more contacts you have and keep in touch with at your local schools, the more likely you are to receive leads.



To start adding information to your Student Information records, click on the **ARISS-RWS** tab. Now click on the **SCHOOL** folder and then on **Student Information**. Just like when you reviewed and added faculty to the School Information section, now you need to focus **on Student Information**.

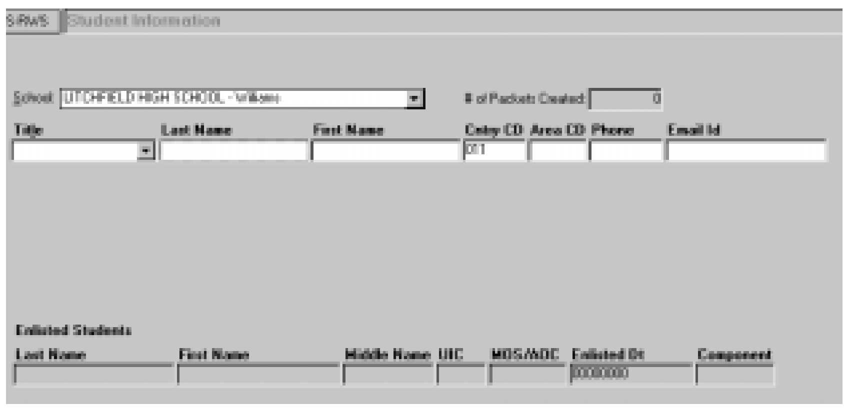
b. The following steps will show you how to collect and maintain student information:

(1) Locate student information records.

(2) Add student information.

16-2. Locate student information records.

a. Take a moment to review this **Student Information** record. The school information is generated when the SC sets the distribution parameters and assigns the school to the recruiter. The recruiter adds the additional information. Notice the **Enlisted Students** section of the screen. Once an individual has enlisted in the RA or USAR, this information area will automatically populate to the correct school in your area.

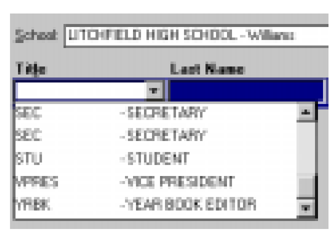


✔ If you have no school (or ZIP Codes) showing on your system, check with your SC to ensure he or she has assigned your schools to you at the ARISS TOS.

✔ If you remember the data on the Lead record, we discussed the importance about selecting the HS from the School drop-down arrow. This will ensure that an enlistment from your HS will show on the Student Information screen.

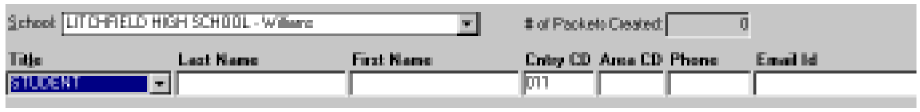
✔ Those items that are grayed out will automatically populate as you work on an applicant's processing packet within ARISS.

b. Now let's update the school's student information. Start by clicking on the **Title** drop-down arrow. This is a list of student and faculty titles. You'll select the appropriate entry for a student. Take a few minutes to review the different titles.



16-3. Add student information.

a. You'll need to type in **Last Name, First Name, Phone** number, and **Email** address if you have it.



b. To input another student contact, you'll need to create another **Student Information** file. Start by clicking on **Edit** on the menu bar. Now click on **Add** and you'll see the scroll bar appear and the **Title** line is now blank.

✔ Just as there is a way to add a new line by clicking on **Edit** and then **Add**, you can use the tool bar icon to add a new line. All you need to do is click on this icon to add a new line.

c. After you have added your student contacts, all that is left to do is **Save** and **Close** this **Student Information** record. Begin by clicking on **File** on the menu bar and now click **Save**. To close the **Student Information** record, click **File** on the menu bar and now click **Close Record**.

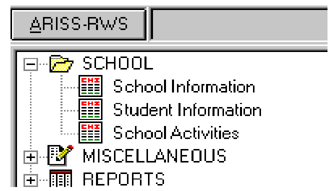
✔ This screen will not show the students assigned to this school, this screen is only to list those students that may have an influence in the school. All of your applicant records will be found on the Find screen and the ones listed here you will need to manually build.

Chapter 17

Collect and Maintain School Activities

17-1. General.

a. You've been inputting faculty and student information. It's time to capitalize on those contacts by going into the school and recruiting. The more "face-time" you spend at an HS, the more likely you are to receive leads by establishing a solid rapport with students and faculty, which will ultimately lead to increased prospecting and production.



b. To assist you with your recruiting mission, learning how to document and add information to your **School Activities** records will help you stay involved with your schools and remind you of important activities. To locate **School Activities** records click on the **ARISS-RWS** tab. Click on the **SCHOOL** icon and then click on **School Activities**.

c. The following steps will show you how to collect and maintain school activities:

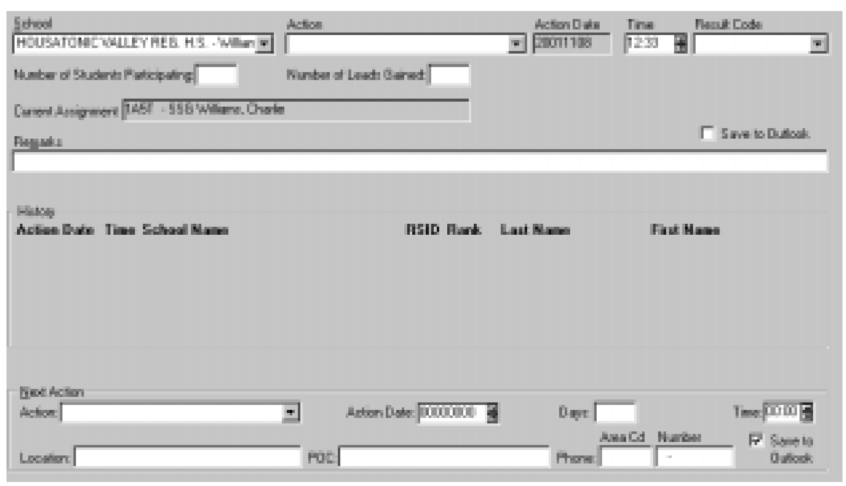
(1) Locate school activity records.

(2) Record your actions.

(3) Create a next action.

17-2. Locate school activity records.

a. Take a moment to review the **School Activities** record. ARISS will automatically default this screen to the first school record. In this case, Housatonic Valley Reg HS. Notice the information in the **Current Assignment** section. This window will automatically populate with your recruiting station identification (RSID) and name. If you are an SC you will be able to see the RA and USAR recruiters who are assigned to that school.

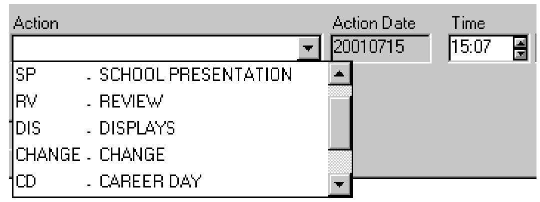


✔ As in the other screens that you recorded Today and Next Action, you will find the box to check and save the information to your MS Outlook calendar.

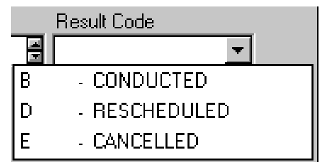
b. If you have scheduled an event at a school other than Housatonic Valley Reg HS, you'd simply click the drop-down arrow of the **School** window and select the school that you want to review.

✔ Remember that the information that you enter in the top of the screen is for Today's action and the bottom section is for what you have or will schedule at a later date.

17-3. Record your actions.



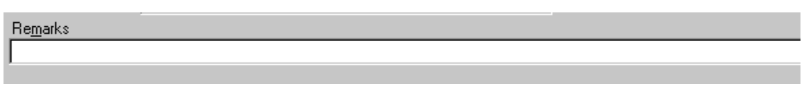
a. Notice the different types of **Action** that you can record. It is very important to your recruiting efforts to keep detailed records of your actions. Anything you do for your school will be annotated by using the appropriate **Action** and **Result Code**. The information that you enter here will be replicated to the TOS and populate your SC's, 1SG's, and Rctg Co Commander's reports. Click the **Action** window scroll bar down arrow to review other actions. So let's go through this screen. Let's say you participated in a school Career Day. Click on the drop-down arrow and click on **CAREER DAY**. Notice the **Action Date** automatically defaults to today's date; however, you will need to enter the **Time** the activity took place.



b. The next item you need to document is the result of that career day. Click the **Result Code** drop-down arrow. Notice you have three options: **CONDUCTED, RESCHEDULED,** or **CANCELLED**. These options are related to whatever you select in the **Action** menu. In this case, you did participate in the Housatonic Valley Reg HS Career Day. Go ahead and click **CONDUCTED**.

c. You've completed entering a new activity. Now you need to enter the **Number of Students Participating** and **Number of Leads Gained** if you gained any new leads.

✔Remember to check your Find screen to ensure it is a new lead and not one that has been replicated to you from another source. This will keep you from duplicating records.



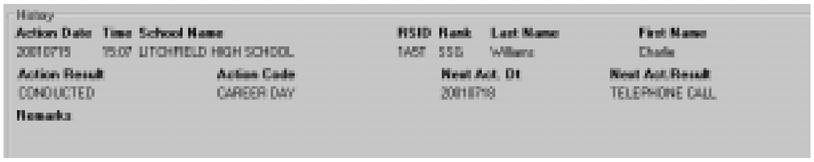
d. The **Remarks** section can be used for any additional information you want to enter. You can enter basic logistics information, how many business cards handed out, or number of information cards completed. This information can be useful for your future School Activities planning.

17-4. Create a next action.

a. Now you need to finish your next action information. For this example, your next action will be a telephone call. Click on the Next **Action** drop-down arrow and select **TELEPHONE CALL**. You select an **Action Date** to indicate when you want to followup and the number of **Days** will automatically fill in once you've entered the **Action Date**. You also need to select a **Time** for your Next **Action** to take place. Now enter the **Location** of your next planned action, the **POC**, and the contact's **Phone** number.

✔Don't forget to keep your MS Outlook calendar updated. Ensure there is a check in the **Save to Outlook** box.

b. Now that you have completed entering that important school activity, all you need to do is save and close information. Begin by clicking on **File** from the menu bar and click **Save**.



c. Notice after you saved the record that your Career Day School Activity becomes a record in the **History** section.

d. Now that you've completed the record, you can close it. Click on **File** on the menu bar and click **Close Record**. This action will take you back to the ARISS-RWS main screen. Do you remember how to get back to the Find screen? If not, review chapter 5.

Chapter 18

Use Mail Merge

18-1. General.

a. Within ARISS you will be able to create letters and envelopes directly from your database information. Besides understanding this function, you need to know how to Create a List and use MS Word. If you need to know how to Create a List, review chapter 10, before attempting this function. This chapter will show you how to use MS Word with the Mail Merge function. Knowing how to utilize Mail Merge will help you with your direct marketing projects.

b. The following steps will show you how to use mail merge:

(1) Create text file.

(2) Open MS Word.

(3) Create main document.

(4) Get source data.

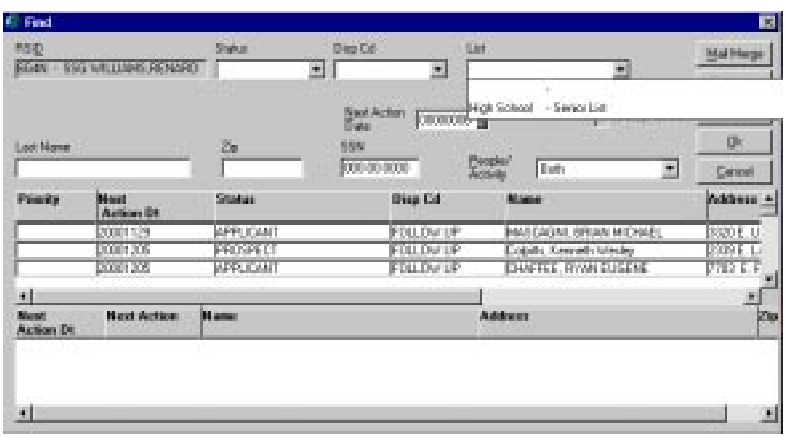
(5) Identify merge fields.

(6) Merge data from text file.

(7) Print merged documents.

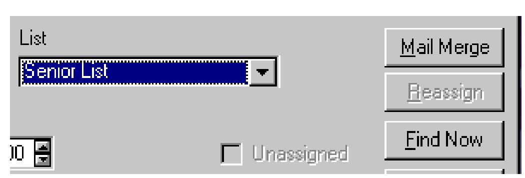
18-2. Create text file.

a. You must have created a list and saved the list before you can use the Mail Merge function. So we will assume that you have created a list and are now ready to use Mail Merge. For example, you want to send a congratulation letter to your high school seniors, so you create a list and save it as “Senior List.”



b. You will find the **Mail Merge** function on the **Find** screen. Once the **Find** screen opens, we will need to create a Senior List text file that can be merged into your MS Word document. Go to the **List** window and click on the drop-down arrow.

c. Select the list that you saved as **Senior List**. Click on **Find Now** to see the individuals that meet the criteria established in your list. Now click on **Mail Merge** in order to compile the senior list information and create a text file that will be used later with MS Word.



d. A message screen will appear asking you to confirm that you want to create a text file. Click on **Yes**. The application will automatically create your Text File and save it in your **Mail Merge** directory folder. Don't worry about the file yet, we will get it once MS Word is openeds.

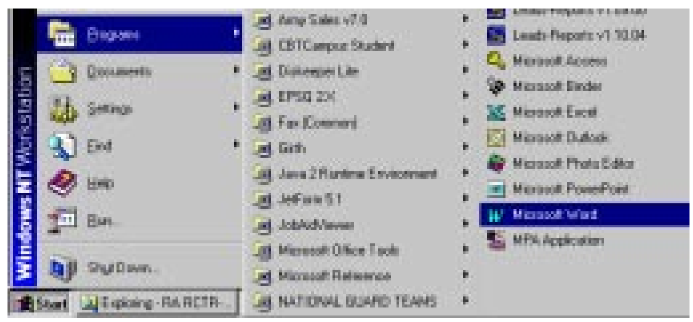
e. Click on **OK**. Now that your senior list is ready, you need to open MS Word to access Mail Merge.

f. You will need to exit the **Find** screen, but you do not want to exit the **ARISS-RWS Leads-Reports** application. Click on **Cancel** to exit the **Find** screen. 

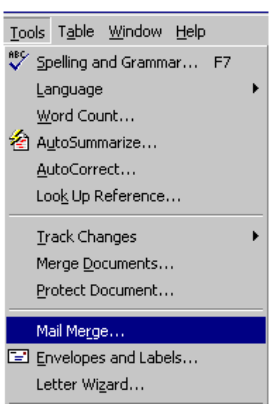
18-3. Open MS Word.

a. You will now find yourself at the beginning of the **ARISS-RWS Leads-Reports** application. Since you are going to open **MS Word**, you will need to minimize the **ARISS-RWS Leads-Report** application. Click on the **Minimize** icon  in the upper right-hand corner of the application.

b. Now, we need to open **MS Word**. If you have hidden your bottom menu bar, move your mouse to where the bar is hidden. When the menu bar appears, click on the **Start** button. You'll locate **MS Word** under the **Programs** option. Click on **Microsoft Word.**



18-4. Create main document.

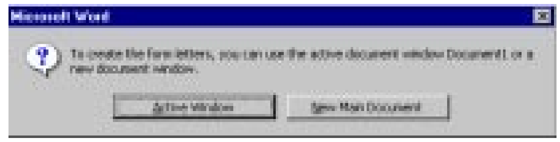


a. Once **MS Word** opens you are now ready to create the document you want to send out to your seniors. Start by clicking on **Tools** on the menu bar and then click on **Mail Merge**.

b. The **Mail Merge Helper** will appear to assist you in setting up your document. The first thing you need to do is choose what format you want your main document to be in. You're going to do a direct mailing to the individuals on the senior list you created. Since you need to create a new document for this mailing, you will click on the **Create** button. You'll be creating one letter, which will be addressed to everyone on the senior list.

✓Notice that you can use Mail Merge to create the Mailing Labels and Envelopes for a mailing.

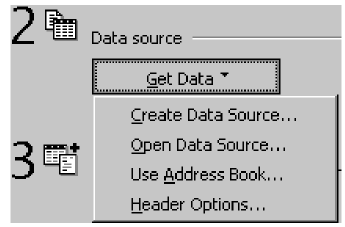
c. Click on **Form Letters** and then click on **Active Window**.

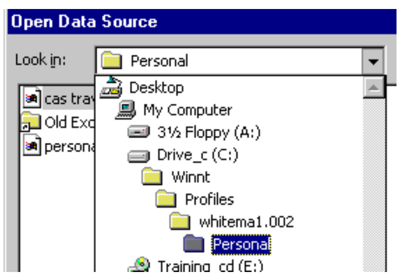


✓You can click on **New Main Document** to retrieve an MS Word document that you have already created.

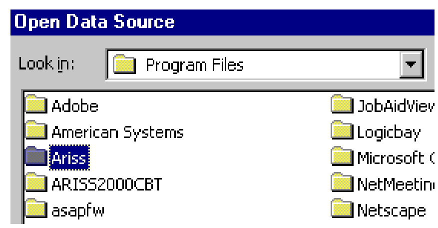
18-5. Get source data.

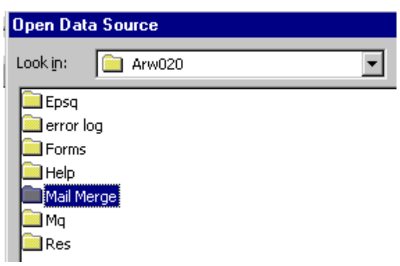
a. Now that you have selected your Main Document, you need to get your source data. Click **Get Data.** Remember we created our source data in the **ARISS-RWS Leads-Report** application, so now click on **Open Data Source**. This will start us on a journey to find the text file that we created earlier. In order to find the text file you created, you need to access C:\Program Files\ARISS\ARW020\Mail Merge. So let's do that now.





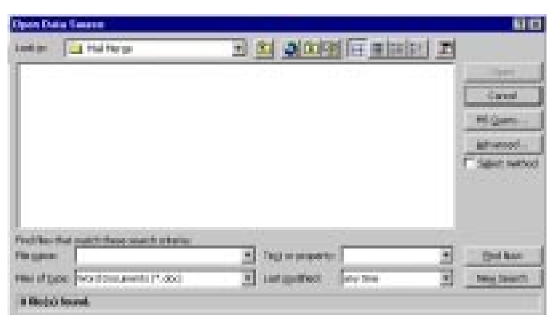
b. Start by clicking the drop-down arrow in the **Look in** window. Click on the **Drive_c(C:)** so we can find the folder called **Program Files**. Now double click on the **Program Files** folder to display additional folders and files. You will see a folder called **Ariss**. Double click on the **Ariss** folder to display its folders and files.





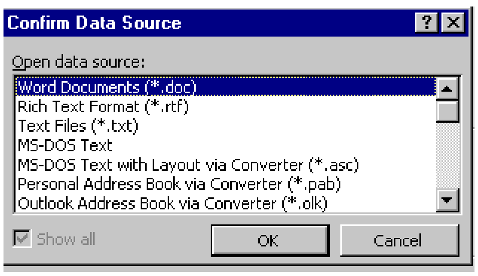
c. Once **Ariss** appears in the **Look in** window, you will need to double click on the **Arw020** folder to view its folders and files. This is where the **Mail Merge** folder is located. Double click on the **Mail Merge** folder to access the text file that you created in **ARISS-RWS Leads-Reports** application.

d. You will not see the **Senior List** file at this point. The **Senior List** file you created was not saved as a Word document (.doc) file, but as a text (.txt) file. You'll need to see all the files contained in the **Mail Merge** folder.



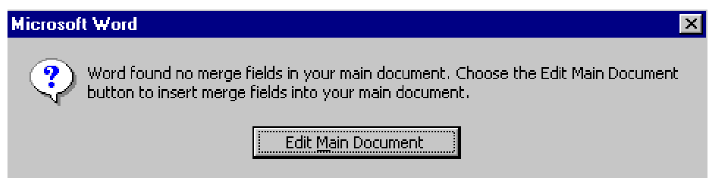
e. Click the **Files of type** drop-down arrow. Click on **All Files (*.*)**. You will now see your **Senior List** file. Highlight the file and click on **Open**.

f. Are you confused yet? It may seem like this is a difficult process, but you are almost finished.



g. Click on **OK** to **Confirm Data Source** and keep it as a Word document file.

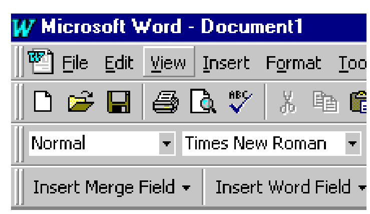
h. Now click on **Edit Main Document**. This task requires you to format the letter you will be mailing. To format this letter you will be linking your **Senior List** text file information into your letter. Using **Mail Merge** will save you hours of addressing letters and envelopes.



✓Remember to use a business format style for your letter. Also, you may need to have your Rctg Bn advertising and public affairs personnel review the letter before you send it.

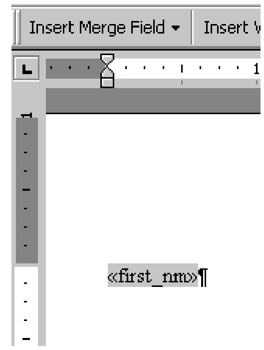
18-6. Identify merge fields.

a. All that is left is to create the letter to your seniors and to format the letter to insert the information from your **Senior List**. You will need to locate the **Insert Merge Field** drop-down arrow to format the letter.



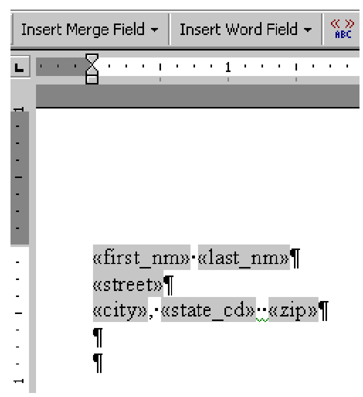
b. The opening information you include on your letter is the name and address of the individual you will be sending the letter to. The first line should include fields for the person's first name and then his or her last name. Start by clicking on the **Insert Merge Field** drop-down arrow.

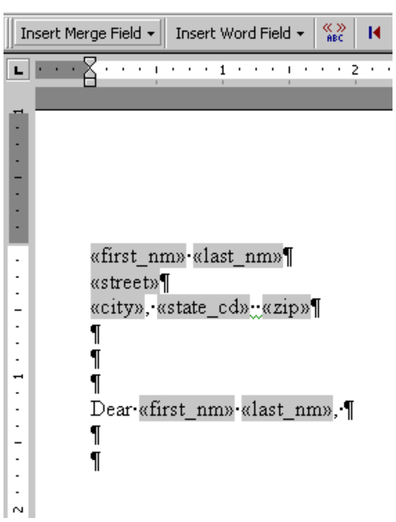
c. Take a moment to review the list of merge fields you can choose to link to your letter. You can even include a telephone number field when necessary. Click on **first_nm** field. You have just created the field that will link the first name information from your original **Senior List** to this letter format. Now before you put in a last name field, you're going to need to put a ***space*** after the **first_nm** field. If you do not insert the ***space*** your last name field and first name field will be attached. To put in a ***space*** to separate the first and last name, use your computer keyboard and press the ***space bar*** once.



d. Now the letter format is ready to have you create the field for the last name. Click on **Insert Merge Field** and then click on **last_nm** to insert the last name. You've completed addressing the first line of your letter. Now press the ***Enter*** key on your keyboard to start the next line and enter the address. You will continue this process to format the letter with the information from the **Senior List**.

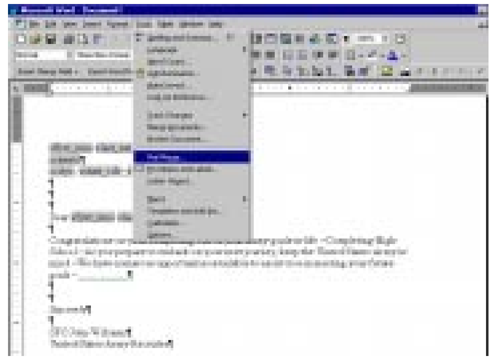
e. Here is an example of what a completed address format looks like. In business letter format, we've added four line spaces after the end of the address to begin the text portion of the letter. Remember, each time you need to add a field you click on **Insert Merge Field**, select the field required, and then use your keyboard for line and space formatting.





f. Next you will fill in the salutation information and begin the letter. For example, begin your letter with the **"Dear"** salutation. After you've entered a salutation, add a ***space*** by using your keyboard. Then click on **Insert Merge Field** and now click the field for entering the **first_nm**. Just as before click on the **Insert Merge Field** to format the information you want on the letter. After you've entered the first and last names, to keep within letter format, you'll enter a ***comma***. Double-space before beginning your letter. Now you need to type the body of the letter and finally end the letter with your signature. It is important to remember to use your keyboard to insert punctuation, spaces, and line formatting when needed. If you make any errors when inserting the data just highlight the information and press the ***Delete*** key, then reenter the information in the correct location.

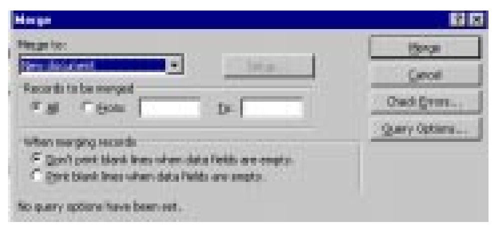
g. Now that you have formatted your letter with the data from your **Senior List**, you are now ready to finish the **Mail Merge**. Click on **Tools** on the menu bar and then click on **Mail Merge**.



18-7. Merge data from text file.

a. The **Mail Merge Helper** will appear. Click **Merge** to insert the **Senior List** data into the document.

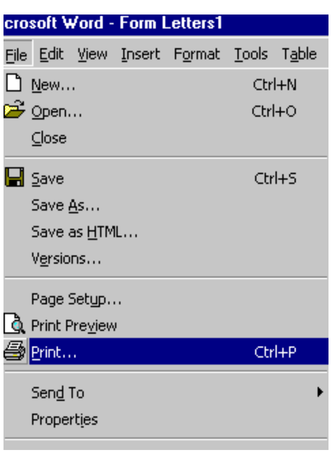
b. Notice in the **Merge to** window you're merging to a **New document**. Click on **Merge**. Your letter will now reflect the information from your **Senior List** and show a complete letter. Notice at the bottom of the screen, the page numbers will increase to the number of names that are on your list.



18-8. Print merged documents.

a. Now you're ready to print and save your files. If you are familiar with MS Word then print and save your files. If you are not, follow the remaining steps.

b. Click on **File** on the menu bar and then click on **Print**. Now that you've printed your list, you need to save it for future mailings. Click on **File** again from the menu bar. Since this is a new list, you need to click on **Save As**. The program should default to your **Personal** folder, but you can save the document in any folder that you wish. Once you have opened the folder, enter the file name and click on the **Save** button. You are now finished with **Mail Merge**. To quit MS Word, click on **File** on the menu bar and then click on **Exit**.



c. If you want to use the letter again, instead of creating a new document, use the file you just saved with the Senior List.

✔Remember that every time you bring up the Senior List from the ARISS-RWS Leads-Reports application and click Find Now that it will bring up a new list of the records in your database. Follow the above steps and you will always have your letters ready to send out.

Chapter 19

SC Daily Performance Review

19-1. General.

a. A productive daily performance review (DPR) with your recruiters is the key to successfully leading your RS to mission success. The ARISS laptop with the Leads-Reports application is your electronic prospect data record box. When you conduct a DPR, you are actually updating all of the RS reports at the same time. Using it properly will help you have productive DPRs with your recruiters. Before you DPR with your recruiters you will need to replicate to ensure the Leads-Reports application is up-to-date. To replicate, connect to your ISP and have a secure tunnel before opening the Leads-Reports application. Review chapters 3 and 4 on logon and replication if you are not familiar with this process.

b. The following steps will show you how to record your DPR comments:

(1) Update Leads-Reports application.

(2) Identify records to DPR.

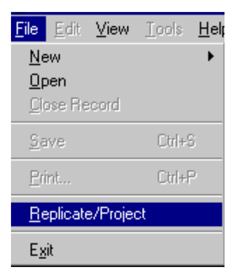
(3) DPR of individual records.

(4) DPR of school activities.

(5) DPR of COI/VIP activities.

19-2. Update Leads-Reports application.

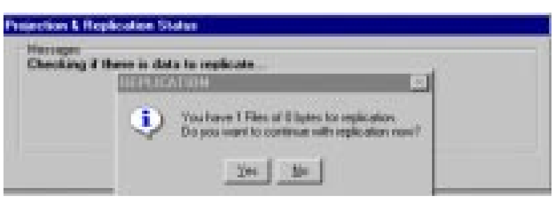
a. To open the Leads-Reports application double click on the **Leads-Reports** icon. The logon window will appear. Enter your **User Id** and **Password** and then click on **OK**. The **User Id** and **Password** is your NT login and should be the same data that you used to logon to the laptop.



b. Once the Leads-Reports application opens, select **File** and then **Replicate/ Project**. You can access the same screen by clicking on the **Telephone** icon.  This will open the **Projection and Replication** screen.

c. Select **Replicate Only**. 

Remember that you must be connected to your ISP and have a secure tunnel as reflected by the green T with a lock symbol to perform replication.



d. If there are records to receive you will get a window that asks if you want to download the record updates. Select **Yes**. Once replication is completed you will see a message window. If you have any messages they will be posted on this screen. You can print this screen by clicking on the **Print** button. Select **OK** and then select **Close** to exit the **Projection and Replication** screen.

e. Now that you have completed replication, you can minimize the **Leads-Reports** application and connect to the **TOS** to review certain reports. The reports that you may want to view at the **TOS** include the **Applicant Processing List, MEPS Processing List, MET Processing Log, Lead Source Analysis Report, DEP/DTP Tracking Log,** and **Leads Disposition.** These reports will assist you with conducting your DPR by showing your recruiters' past and future actions.

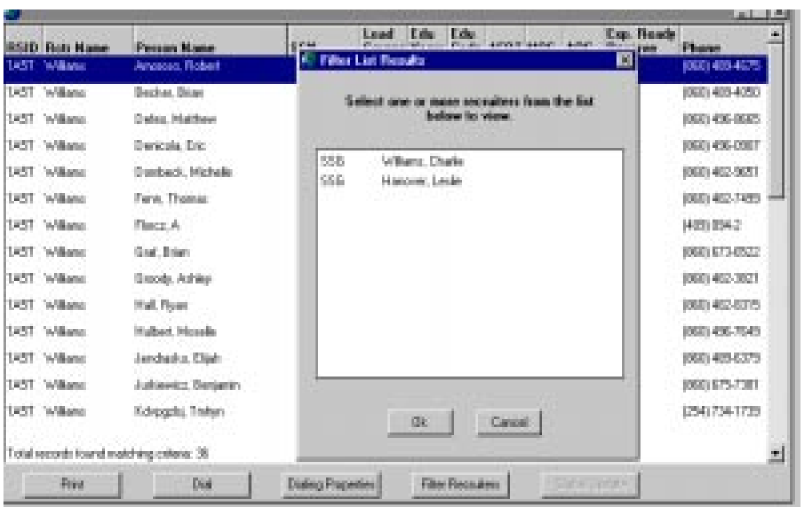
✔Remember by completing a thorough DPR you are updating the reports once you replicate. These reports can be at the individual or RS level.

f. Now that you have replicated, updated your database, and pulled the reports from the TOS, all that you need to do is to review your recruiters' records and annotate your comments in the **Contact History** of the **ARISS-RWS Leads-Reports** application. Whether you minimized or closed the **ARISS-RWS Leads-Reports** application, you need to open the application to start your DPR. You need to go to the **Find** screen to identify the specific records you want to review. The **Find** screen will also allow you to review the recruiters' **COIs, VIPs,** and **School Activities** records.

✔Review chapter 5 on the Find screen if you are not familiar with its functions.

19-3. Identify records to DPR.

a. You can identify the records that you need to DPR two different ways. First you can use the **Create List** function or you can use the **Find** screen.



b. If you are not familiar with the Create List function review chapter 10. There is a new feature that will allow you to filter individual recruiters once you have established your search criteria and pulled up the list. When you select the recruiter and click OK only those records assigned to that recruiter will show on the list. Once you're finished and want to do the next recruiter, just click on the **Filter Recruiters** button and select the next recruiter. This will help you keep the same criteria when doing your DPR.

✔You will still need to follow this chapter to conduct your DPR, but you now have a choice in how you find the records in which to DPR.

c. At the **Find** screen choose the recruiter from the **RSID** list and then select **Find Now**. This will show all of the records assigned to that recruiter. You can establish specific search criteria to narrow the records that you want to review. They can be used individually or in tandem with each other.

(1) **Status** - Select Lead, Prospect, Applicant, DEP, or DTP.

(2) **Disp Cd** - Choose from 38 dispositions codes.

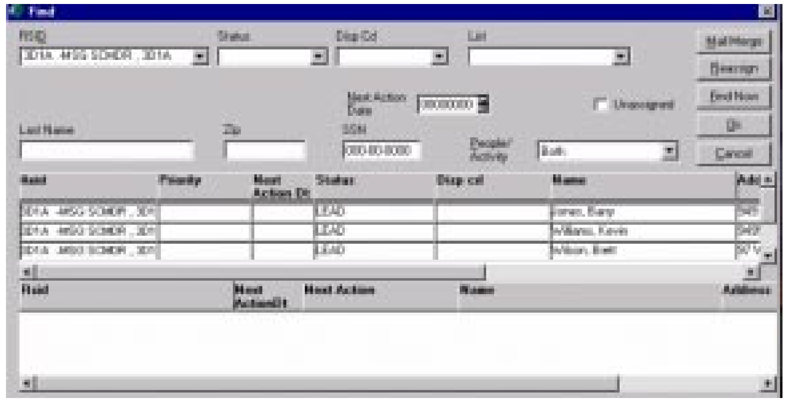
(3) **List** - Choose from saved lists.

(4) **Next Action Date** - Choose date of next action.

(5) **Last Name** - Choose by last name.

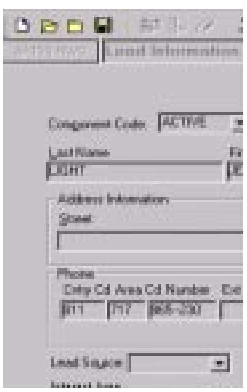
(6) **Zip** - Choose by ZIP Code.

(7) **SSN** - Choose a specific record by SSN.

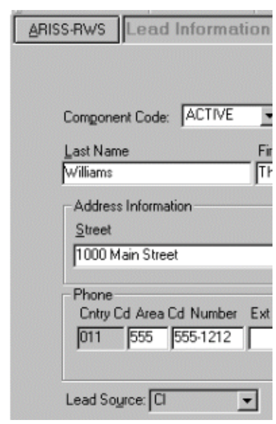


d. Once you have established your search criteria, click on **Find Now**. This will display all the records based on the search criteria. Clicking on any of the column header buttons will sort the records in ascending or descending order by that column. Select the applicant's record that you want to review and click on **OK**. This will take you to the **Prospect Record** or **Lead Information** screen depending on the applicant's status.

e. Once the record is open you must first determine if the information is valid and complete and then give detailed instructions and guidance to the recruiter. This will ensure the processing cycle is compressed. Remember to record your comments in **Contact History** when reviewing the applicant's data and discussing with your recruiter.

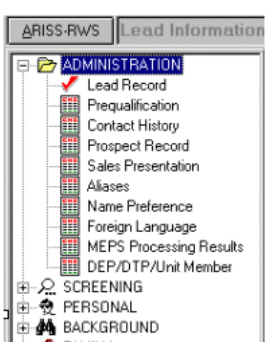


f. If you open a **Lead Information** record and the **ARISS-RWS** tab is grayed out, you will not be able to complete any further actions on this record. The recruiter needs to enter a **Lead Source** code before any comments can be recorded.



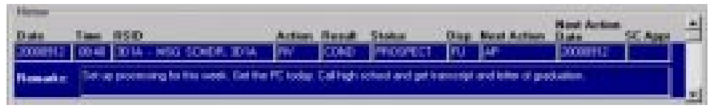
g. If the **ARISS-RWS** tab is not grayed out, you can review and record your comments on the record. Review this screen for completeness. Once reviewed click on the **ARISS-RWS** tab.

19-4. DPR of individual records.

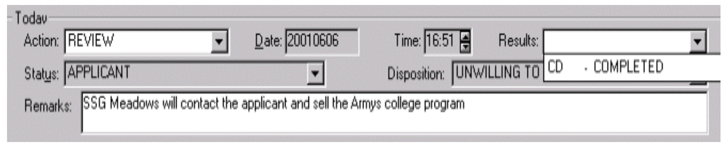


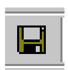
a. A menu will appear, select **Contact History** from the **ADMINISTRATION** menu.

b. Using the scroll bar in the **History** section will allow you to review all entries made by the recruiter, including those previously approved by you. Review those entries you have not acted on, discuss with recruiter, and either approve or disapprove them.

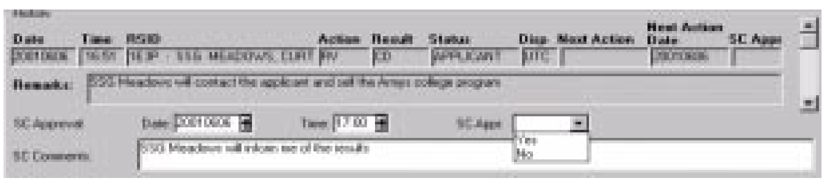


c. To reflect that you reviewed entries, select the **Action** drop-down arrow in the **Today** section. You will notice that you have only one selection so click on **REVIEW**. Select the **Results** drop-down arrow and click on your only selection which is **COMPLETED**. You can annotate any comments in the **Remark** section.



d. For the SC to approve the actions that are annotated in the **Today** section, the SC must click on the **Save** icon  to move **Today's** action to the **History** section.

If you fail to save the Today's action before trying to complete the SC Appr, you will save only the last action in the History section.



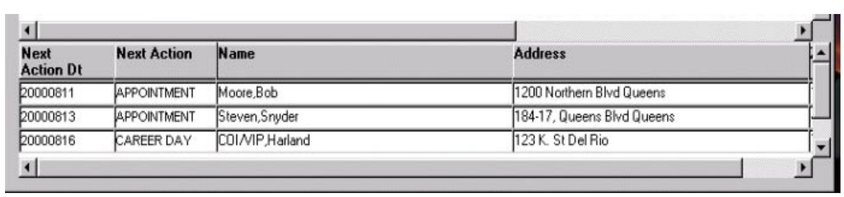
e. Select the **SC Appr** menu near the bottom of the screen. You will select **Yes** or **No**. The **Yes** or **No** will now show under **SC Appr** in the **History** section. You can enter comments as needed to give specific guidance to the recruiter.

Approving specific disposition codes will remove the record from the recruiter's and your database. See chapter 23 on removing old and duplicate records for this process.

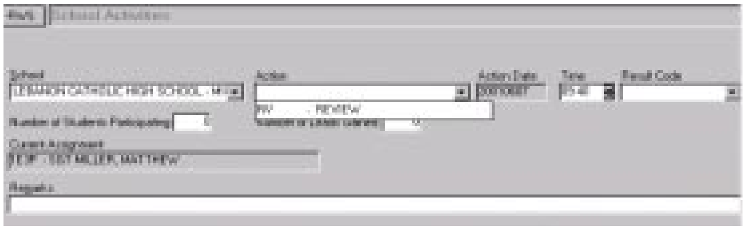
f. If there are actions that the recruiter has completed and you have not approved or disapproved them, you can enter that information now without annotating any information in the **Today** section. All that you need to do is scroll through the **History** entries and select **Yes** or **No** from the **SC Appr** drop-down arrow. Save and close the record when finished and move on to the next record that you need to DPR. Repeat the above steps until you have completed reviewing the individual records.

19-5. DPR of school activities.

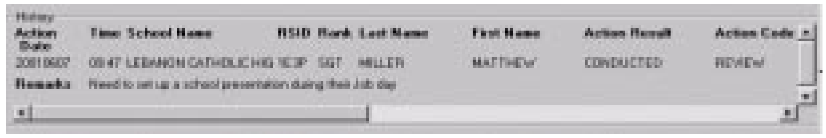
a. During DPR with the recruiter you have the ability to review all scheduled and conducted school visits or activities. The steps are similar to reviewing an individual record. This allows you to see all the activities scheduled without using the School Folders. Select **File** and **Open** from the menu bar. The bottom portion of the screen contains the **Schools Activities** that are scheduled. Click on the record that you want to review and select **Find Now**.



Next Action Dt	Next Action	Name	Address
20000811	APPOINTMENT	Moore,Bob	1200 Northern Blvd Queens
20000813	APPOINTMENT	Steven,Snyder	184-17, Queens Blvd Queens
20000816	CAREER DAY	COI/VIP,Harland	123 K. St Del Rio



b. Review the information on the record. Select the **Action** drop-down arrow and choose **REVIEW** and then select **CONDUCTED** from the **Result Code** drop-down arrow. As you can see there is only one item that you can select from the **Action** and **Result Code**. You can enter your comments in the **Remarks** section. Now click on the **Save** icon. You will notice that your actions are now showing in the **History** section.

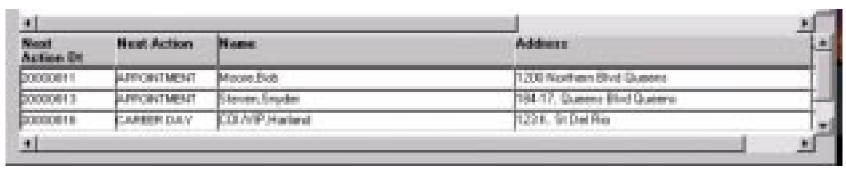


c. If you want to review the other schools, click on the **School** drop-down arrow and select the next school. Enter the **Action, Result Code**, and **Remarks** for each school that you review.

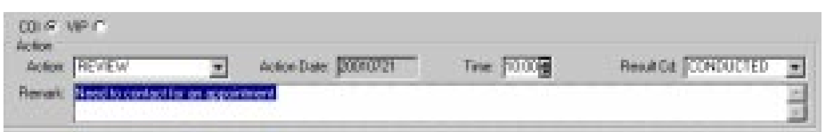
d. To return to the **Find** screen to continue your review, click on the **Open Folder** icon or click on **File** from the menu bar and then click on **Open**.

19-6. DPR of COI/VIP activities.

a. During DPR with your recruiter you have the ability to review all scheduled and conducted COI and VIP activities. The steps are similar to reviewing an individual record and school activities. This allows you to see all the activities scheduled and conducted. Just like the school activities scheduled, the bottom portion of the screen contains the COI and VIP records. Choose the record that you want to review and select **OK**. This will open the **COI** or **VIP** record.



b. Review the information on the record. Select the **Action** drop-down arrow and choose **REVIEW**. Select the **Result Cd** drop-down arrow and choose **CONDUCTED**. Enter remarks in the **Remark** section.



c. When you save the information your actions will be moved to the **History** section. To exit and return to the **Find** screen, again click on the **Open Folder** icon. Repeat the above steps on all COI and VIP records that need to be reviewed.

d. When finished reviewing all records you need to replicate the information to your recruiter. To replicate, select the **Telephone** icon or select **File** and then click on **Replicate/Project**. The replication window will open, select **Replicate Only**.

Chapter 20

SC Reassigning Records

20-1. General.

a. The ARISS-RWS Leads-Reports application allows you, as the SC, to easily transfer records from one recruiter to another or to another RS. Being familiar with this process will allow you to manage records within your RS during those periods of time when your recruiters have departed. You can reassign records permanently or for a short period of time. Some of the reasons you would reassign records are a recruiter is permanently changing stations (PCS'ing), going on temporary duty, or that recruiter will become the SC. For whatever reason, this will allow for the smooth and professional transition of records that require processing.

b. The following steps will show you how to reassign records:

(1) Identify records to be reassigned.

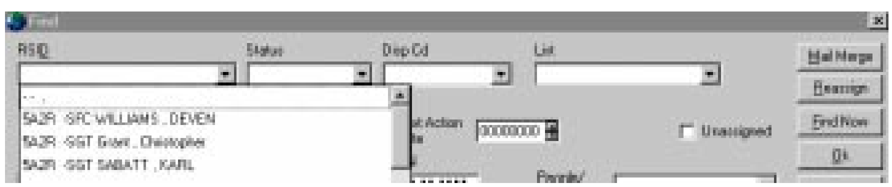
(2) Determine permanent or temporary reassignment.

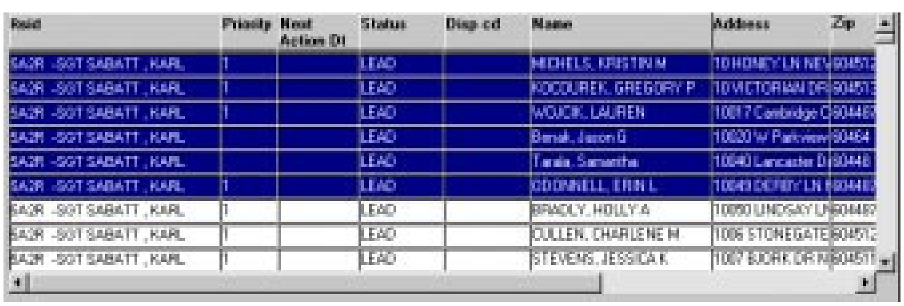
(3) Reassign and replicate reassigned records.

20-2. Identify records to be reassigned.

a. You need to access the **Find** screen, so select **File** and **Open** from the menu bar or click on the **Open** icon. 

b. From the **RSID** drop-down arrow, you need to select the recruiter that you will transfer records from. You may also select the **Status** to narrow the search for a record or records. Select **Find Now**.



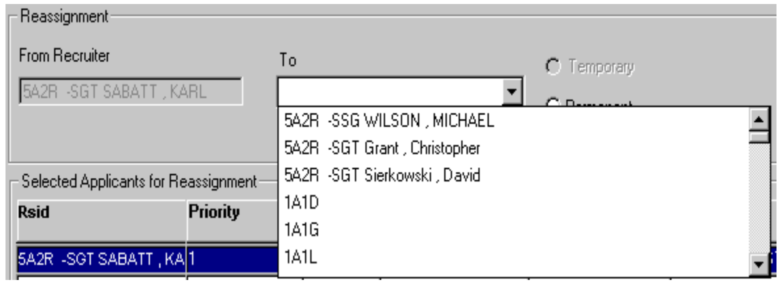


c. This will display the records that are assigned to the selected recruiter. Select the applicant's record or records you will be reassigning by clicking on the name once. The line should turn blue. Click on the **Reassign** button  to continue.

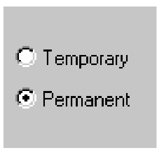
✓ You can select all the records by choosing the first record then scrolling to the bottom of the list (while holding the ***Shift*** key) and selecting the last record.

20-3. Determine permanent or temporary reassignment.

a. The **Reassignment** screen will appear with all the records that you have selected. The **From Recruiter** will be grayed out and should be the recruiter you selected from the previous screen. From the **To** drop-down arrow, select the **Recruiter** or **RSID** that you will be transferring the record or records to. You will see all the recruiters that are assigned to the RS listed at the top of the list.



✔ You should reassign records to another RSID if a ZIP Code or school was transferred to another RS or if you have lost your USAR recruiter and another RS is taking over the USAR mission. Consult with your company leadership team (CLT) for guidance.



b. You will need to determine if this record will be a temporary or permanent reassignment. If **Temporary** is selected, another field will appear requiring a **From** and **To** date. This will take the record from the first recruiter's database for the timeframe specified and return it once the time period has expired. You can use the **Temporary** reassignment when your recruiter will keep their current database extract and will be absent for a short period of time such as when they are on leave. If they will be absent for an extended period of time, your recruiter will probably need a new extract and the **Temporary** reassignment will not work.

20-4. Reassign and replicate reassigned records.

a. Select the applicant's record or records you will be reassigning by clicking once on their name. The line should turn blue. Click on the **Apply** button and you will see those records disappear. If you selected all of the records, the **Reassign** screen will close and you will be returned to the **ARISS-RWS** main screen. If there are records remaining, you can select another recruiter to reassign the other records to. This will allow you to distribute the records among several recruiters.

✔ You can select all the records by choosing the first record then scrolling to the bottom of the list (while holding the ***Shift*** key) and selecting the last record.

b. To complete the reassignment process, select **File** from the menu bar and then **Replicate/Project**. The projection and replication window will appear, select **Replicate Only**.

✔ Both recruiters must replicate to allow the records to be first removed then added to the proper database. The losing recruiter will replicate first, then the gaining recruiter.

Chapter 21

SC Reassigning Unassigned Records

21-1. General.

a. The ARISS-RWS Leads-Reports application will allow you, as the SC, to easily transfer unassigned records, including leads, to your recruiters. Unassigned records can occur when recruiters PCS and their records were not reassigned to another recruiter prior to their departure or ZIP Codes and schools are not assigned properly to individual recruiters.

b. The following steps will show you how to reassign unassigned records:

(1) Access the Find screen.

(2) Identify unassigned records.

(3) Reassign unassigned records.

(4) Replicate reassigned records.

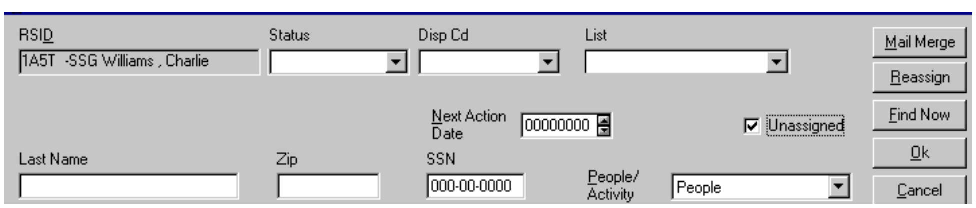
✔ If you have not set your leads distribution parameters at the TOS, you will probably find you have several unassigned leads. These will accumulate very rapidly if you do not maintain your leads ZIP Code and school distribution parameters, especially after a recruiter has PCS'd.

c. If you do find unassigned records in the application, you need to determine why there are these records and take steps to make the correction immediately.

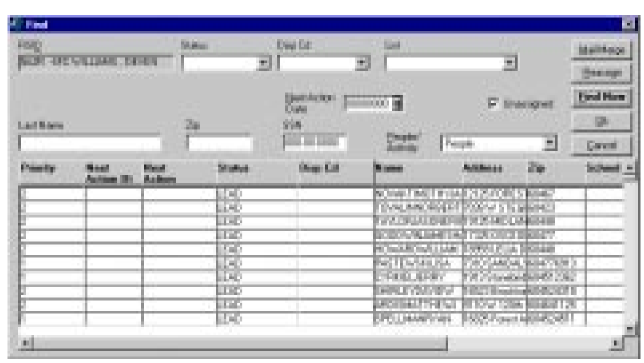
d. If you do find unassigned records the following steps will assist you in reassigning those records to your recruiters. This will ensure that all records sent to the RS are being reviewed and available to be worked by your recruiters. If you find several leads under unassigned you may want to review the TOS distribution parameters to ensure all assigned schools and ZIP Codes are assigned to your recruiters. As the SC, you will be the only person to receive unassigned records.

21-2. Access the Find screen.

a. Before proceeding, check the TOS distribution parameters to ensure all ZIP Codes and schools are assigned to your recruiters.



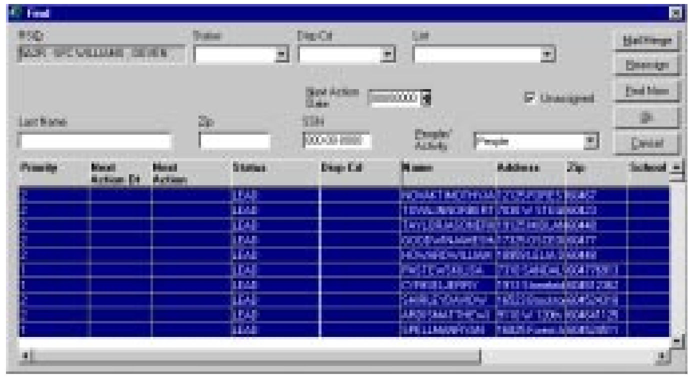
b. You need to check your ARISS-RWS Leads-Reports application for any unassigned leads. Open the **Leads-Reports** application and select **File** and then **Open** from the menu bar. The **Find** screen will appear. Click on the **Unassigned** box and then click on the **Find Now** button. A separate screen will appear with any unassigned records. You will need to reassign these records to your recruiters.



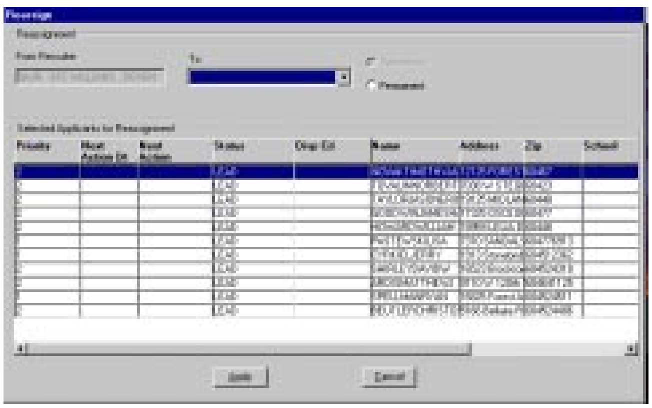
21-3. Identify unassigned records.

a. This screen will show all of the records that are not assigned to any specific recruiter. You can click on any of the header buttons to sort the records in ascending or descending order by that column.

b. To reassign these records to your recruiters, highlight all of the records to be reassigned and click on the **Reassign** button. This will bring up the **Reassignment** screen. You can highlight only those records you want to reassign to a recruiter or you can highlight all of the records and then do the individual reassignment in the **Reassignment** screen.

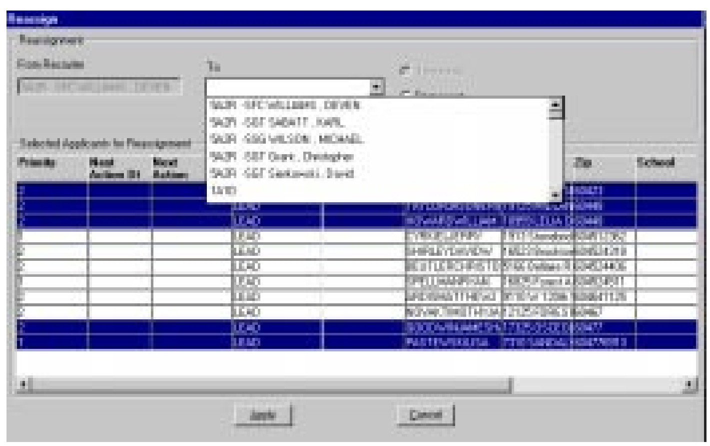


21-4. Reassign unassigned records.



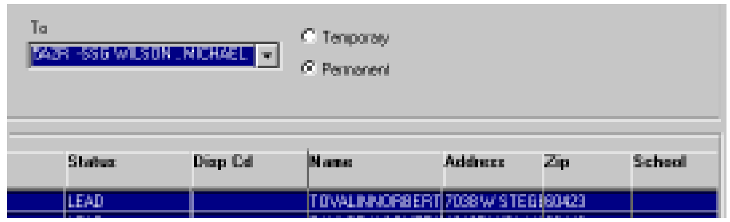
a. The **Reassignment** screen will appear with all the records that you just selected.

b. Highlight the record or records that you want to reassign. From the **To** drop-down arrow you will see all the recruiters that are assigned to your RS. Select the **Recruiter** or **RSID** that you will reassign the record or records to. If you want, you can reassign the records to yourself to review before reassigning them to one of your recruiters.



✔ If the record, based on address or school, is no longer in your area, you can reassign that record to another RS. Other RSs can reassign records to you for the same reason.

c. You need to select **Permanent** reassignment of these records.



✓ A temporary reassignment will require a From and To date. This will take the record from the first recruiter's database for a specific period of time and return it once the time has expired.

d. Click on the **Apply** button once you are finished. After you click the **Apply** button, the records that were highlighted will disappear. If there are records remaining complete the previous steps to reassign all remaining records to your recruiters. Once all records are reassigned, you will be returned to your **Find** screen.

21-5. Replicate reassigned records.

a. To complete the reassignment process select **File** and then **Replicate/Project**. The projection and replication window will appear or just click on the **Replicate/ Project**  icon.

b. Select **Replicate Only**.

✓ After you have replicated, inform your recruiters that they will have new records coming the next time they replicate. Your recruiters should wait a few minutes before trying to replicate the new records to their ARISS-RWS Leads-Reports application.

Chapter 22

SC Managing Temporarily Disqualified Records

22-1. General.

a. To manage records that your recruiter has identified as temporarily disqualified is easy. After completing your DPR with your recruiter all you need to do is approve the temporary disposition and then temporarily reassign those records to you. Using the temporary reassignment, the records will automatically be reassigned back to your recruiter on the date you set. This will allow your recruiters to work only those records that are potential candidates and leave the recruiter's database free of temporarily disqualified records.

b. This process was established to assist you with managing your ARISS-RWS Leads-Reports database and those of your recruiters.

c. The following steps show you how to manage temporarily disqualified records:

(1) Define temporarily disqualified.

(2) Reassign temporarily disqualified records.

(3) Review records with create List.

(4) Review and annotate next action.

22-2. Define temporarily disqualified.

a. The disposition listed in table 22-1 will show a record as temporarily disqualified in the ARISS-RWS Leads-Reports application. By temporarily reassigning these records to yourself, you will be able to automatically suspense the records for followup and keep your recruiter's database free of disqualified records.

Table 22-1
Disposition Codes

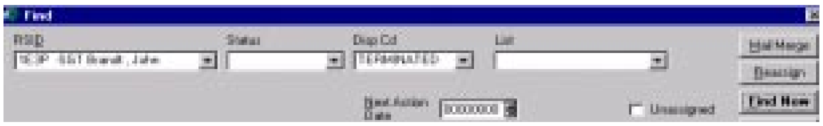
Product of Final ARISS-RWS Disposition	ARISS-RWS Applicant Status				
	Applicant	DEP	DTP	Lead	Prospect
Declined	X				
Incomplete Medical Records	X			X	X
Moved	X			X	X
Not Interested	X			X	X
Not Interested - College	X			X	X
Not Interested - Continuing Education	X			X	X
Possible Transfer	X			X	X
PT Fail	X				
Temporary Unqualified	X	X	X	X	X
Unable to Contact	X			X	X
Unqualified ASVAB	X			X	X
Unqualified Dependents	X	X	X	X	X
Unqualified Education	X	X	X	X	X
Unqualified Moral	X	X	X	X	X
Unqualified Physical	X	X	X	X	X
Unqualified Underage				X	
Unwilling to Commit	X			X	X

b. To utilize this process, your recruiters must identify and record a temporary disposition code on each of the records that have been found as disqualified. Instruct your recruiters to code each record with the correct disposition code and record any additional information in the **Comment** section on the **Contact History** screen. Once they have updated those records that are temporarily disqualified, have them replicate.

c. You will need to replicate after your recruiters have annotated records as disqualified and replicated to ensure that your ARISS-RWS Leads-Reports data is up-to-date.

✓You will need to be connected to your ISP and have a secure tunnel to replicate. As soon as you finish replicating, disconnect from your ISP. If you need assistance, review chapter 3 involving logon.

d. Now that you have completed replication, select **File** and then **Open** to access the **Find** screen. You can also click on the **Open Folder** icon  to access the **Find** screen.



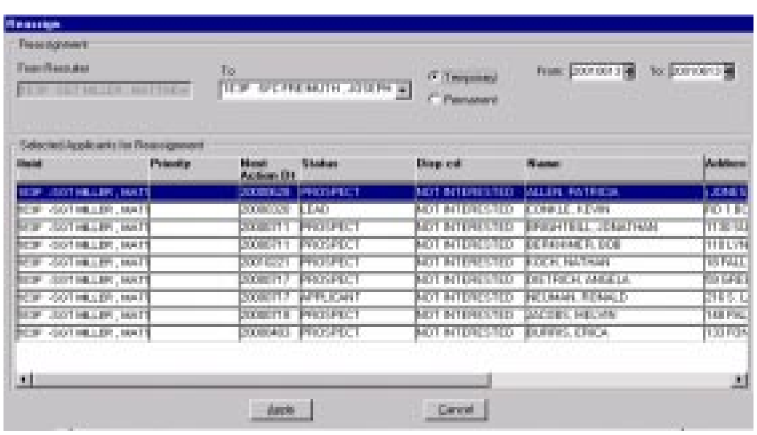
e. From the **RSID** drop-down arrow select the recruiter that you will transfer the records from. You may also select the **Status** or **Disp Cd** to narrow the search for the records. Select **Find Now**.

✓You only need to do the next step if you do not want your recruiters to have those records that are classified as temporarily disqualified. If you leave the records with your recruiters, review each record and annotate your comments in the Contact History screen.

22-3. Reassign temporarily disqualified records.

a. That recruiter's records will be displayed on your **Find** screen. Select the records you want reassigned by clicking once on their name. The line should turn blue. Click on the **Reassign** button to continue.

✓You can select multiple records by choosing the first record then scrolling to the bottom of the list (while holding the ***Shift*** key) and selecting the last record.



b. The **Reassign** screen will appear with all the records that you had selected. The **From Recruiter** should be the recruiter you're transferring from. Select yourself from the **To** drop-down arrow. When you select **Temporary** the date fields will appear. Enter today's date in the **From** field. Determine what date you want the record to be returned and enter that date in the **To** field. The **To** date can be the suspense date that you want the record to be returned to your recruiter for his or her further action. Select the applicant record or records you will be reassigning by clicking once on their name. The line should turn blue.

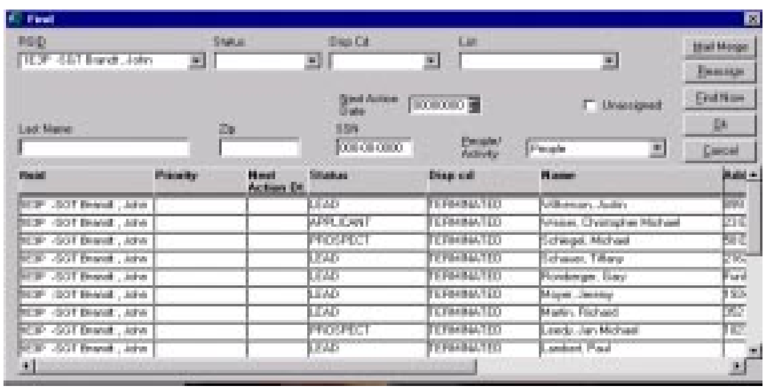
You can select multiple records by choosing the first record then scrolling to the bottom of the list (while holding the ***Shift*** key) and selecting the last record.

c. When you have selected the records that meet the date range click the **Apply** button to tag those records for reassignment. If there are other records that you want to suspense for a different date, follow the above steps until you have tagged all of the records that you identified for reassignment. Once you are finished the **Reassign** screen will close and you will return to the **Leads-Report** main screen. To complete the reassignment process select **File** and then click on **Replicate/Project**. The projection and replication window will appear. Select **Replicate Only**.

The recruiter that is losing the records will need to replicate after you.

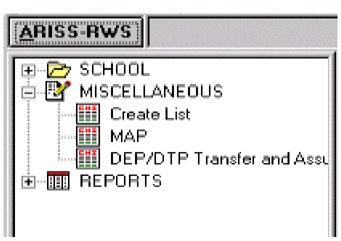
d. The next time that the recruiter replicates he or she will receive a message that records are being reassigned. Once the recruiter receives this message he or she needs to replicate again to remove the records from their database. You should wait a short period of time after your recruiter is notified of the reassignment before you replicate again to receive the records that you reassigned to yourself. Follow the above procedures to replicate again to receive those records.

Remember that you must be connected to your ISP and have a secure connection as reflected by the green T with a lock symbol to perform replication.

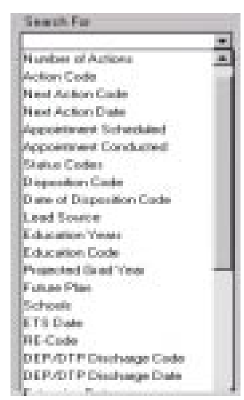


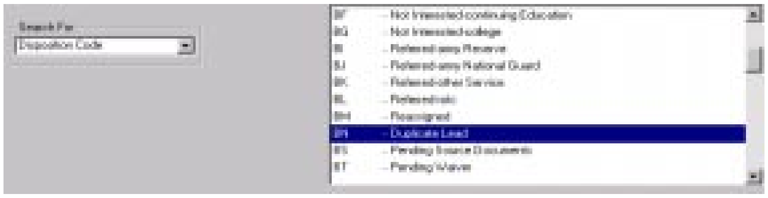
e. Once you have replicated, go to the **Find** screen. From the **RSID** drop-down arrow select your name and then select **Find Now**. This will show all of the records now assigned to you. Since you have reassigned these records first you now need to approve the disposition actions recorded earlier by your recruiters. You can do this from the **Find** screen, but to save time recommend you use **Create List**. Using the **Create List** function will save you time by allowing you to annotate the **Contact History** quickly. To utilize the **Create List**, click on **Cancel** to close the **Find** screen.

22-4. Review records with create list.

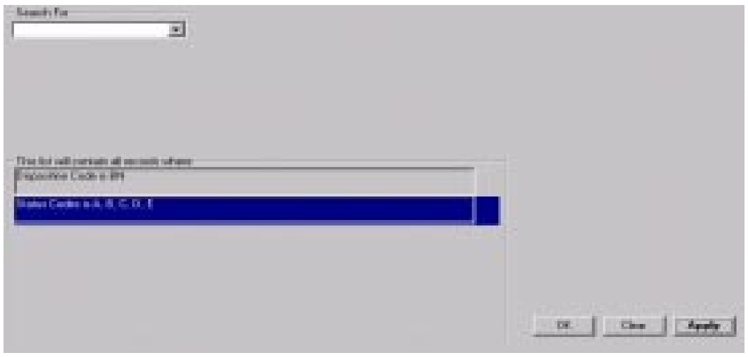


a. Now click on the **ARISS-RWS** tab. Select **MISCELLANEOUS** and then select **Create List**. The **Create List** parameter screen will appear for you to establish your search criteria. The **Search For** drop-down arrow will show all of the data fields that can be selected to make your search as general or specific as you need.

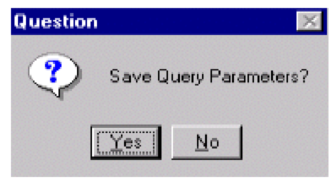




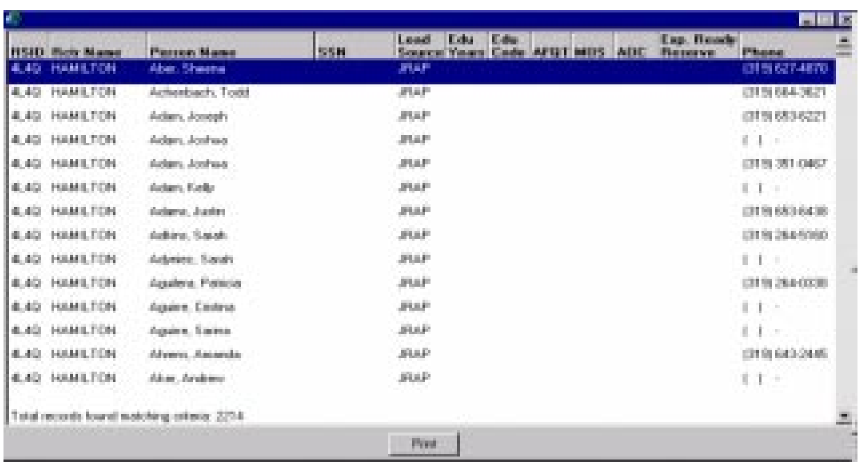
b. When you have identified the **Search For** item, another box will appear for you to further identify the parameters of your search. You can select more than one item from the parameters identified under the **Search For** criteria. You can do this by clicking on the first item and then hold down the ***Shift*** key and click on the last item and it will highlight all items in between. If you want to select specific items, hold down the ***Ctrl*** key and click on each item that you want as the search parameters.



c. Click **Apply** to set the search parameters. If you need to make a change on one of the selected parameters, highlight the item in the screen and click on **Clear**. This will remove the item from the **Search For** window. Once you have established your search parameters, click on **OK**.

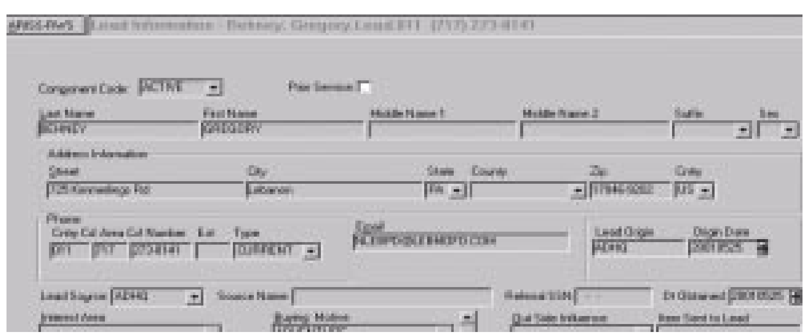


d. This will start the search. You will be prompted to save your search parameters. Click on **Yes** or **No**.

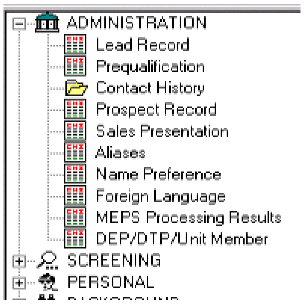


e. Records meeting your search criteria will be displayed. To update the **Contact History** screen, double click on the applicant's record that you want to review. This will take you to the **Prospect Record** or **Lead Information** screen depending on the applicant's status.

f. If you open a **Lead Information** record and the **ARISS-RWS** tab is grayed out, you need to enter a **Lead Source** code before any further actions can be accomplished.

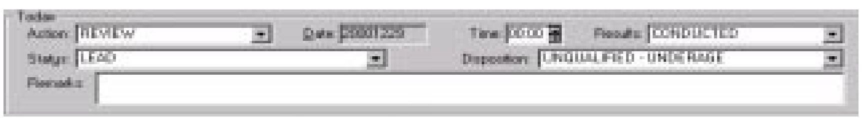


22-5. Review and annotate next action.



a. Click on the **ARISS-RWS** tab. A menu will appear, select **Contact History** from the **ADMINISTRATION** menu.

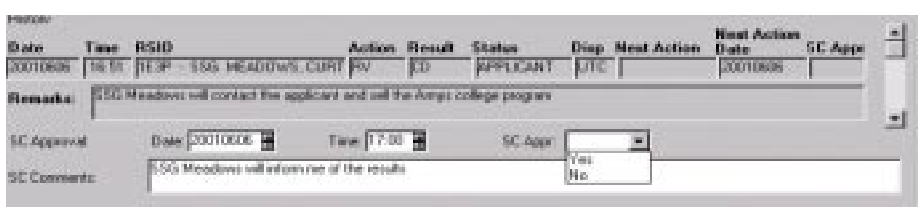
b. Using the scroll bar in the **History** section of the **Contact History** screen, you can review all entries made by the recruiter, including those previously approved by you.



c. To reflect that you reviewed entries select the **Action** drop-down arrow in the **Today** section. Your only selection is **REVIEW,** so select **REVIEW**. Select the **Results** drop-down arrow and choose **CONDUCTED**. Ensure that the **Disposition** has the appropriate disposition code listed. You can annotate your comments in the **Remarks** section.

d. Since this is a temporary reassignment and the records will be automatically reassigned back to your recruiter you will want to enter a **Next Action** and **Date** that are a few days after the **Temporary To** date. Entering this information will suspense the record with the action that you want your recruiter to accomplish when they receive the record back.

e. To approve the actions that are annotated in the **Today** section, you must click on the **Save** icon to move **Today's Action** to the **History** section. If you fail to save the action before annotating the **SC Appr**, you will save only the last action in the **History** section. To move actions from **Today**, you must **Save** first and then complete the SC approval. Select the **SC Appr** drop-down arrow near the bottom of the screen and then select **Yes**.



f. The **Yes** will now show under **SC Appr** in the **History** section. You can enter any additional comments as needed to further identify what actions you want taken on the record. Save the record each time you approve an item.

g. To return back to the **Create List** to annotate another record, click on the **Review List**  icon. Select the next record from the **Create List** and continue the above steps until all records are annotated with a final disposition code and approved or disapproved. Once you have completed your list, select the **Telephone** icon to replicate or select **File** and then **Replicate/Project**. The replication window will open, select **Replicate Only**.

h. You will find that this process for managing temporarily disqualified records will be faster using the reassignment and create list process. This will keep your recruiters concentrating on the prospects and applicants that they are working. It will also allow your recruiters to contact those leads that may be future candidates instead of spending time trying to sort through records they have already disqualified. This process will allow you to approve several records in a short period of time, and you are now using the full functions of the ARISS-RWS Leads-Reports application.

Chapter 23

SC Removing Old, Permanently Disqualified, or Duplicate Records

23-1. General.

a. During a review of your **Find** screen you see there are several records that your recruiters have coded as permanently disqualified, old, or duplicate. Removing records that are no longer needed is a function of the DPR process. To remove an old, disqualified, or duplicate record all you need to do is review the Contact History, approve the termination code, and replicate. We discussed the DPR process in another chapter so all we need to do is discuss what is considered a termination code and the process for approving and removing the record. Depending on the number of records requiring termination, you may want to consider reassigning those records to yourself. This will remove the records from the recruiter's database sooner and allow you to use the **Create List** function to approve the termination codes quickly.

b. The following steps will show you how to manage temporarily disqualified records:

(1) Define permanent disqualified.

(2) Reassign permanent disqualified records.

(3) Review records with create list.

(4) Review and approve disqualified disposition.

23-2. Define permanent disqualified.

a. The disposition codes shown in table 23-1 will cause a record to be removed from the ARISS-RWS Leads-Reports application after you approve it.

Table 23-1
Disposition codes

ARISS-RWS Disposition	Applicant	DEP	DTP	Lead	Prospect
Deceased	X	X	X	X	X
Discharged	X	X	X	X	X
Duplicate Lead	X			X	X
Duplicate Merge				X	X
Enlisted Other Service	X			X	X
ETS	X			X	X
Moved	X			X	X
Permanent Disqualified Retention	X				X
Permanent Unqualified					X
Permanent Unqualified Age	X				
Permanent Unqualified Dependents	X	X	X		X
Permanent Unqualified Moral	X	X	X	X	X
Permanent Unqualified Physical	X	X	X	X	X
Permanent Unqualified Retention				X	
Referred - Active Component	X				
Referred - Army National Guard	X				X
Referred - Other Service	X				X
Referred - ROTC	X				X
Referred - Enlisted				X	
Referred - Active Component				X	
Referred - Army National Guard				X	
Referred - Other Service				X	
Referred - ROTC				X	
Requested Suppression	X			X	X

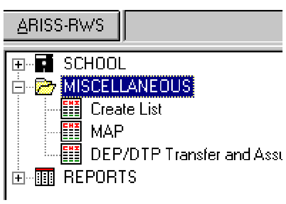
Table 23-1
Disposition codes--continued

ARISS-RWS Disposition	Applicant	DEP	DTP	Lead	Prospect
Shipped		X	X		
Terminated	X			X	X
Unqualified - Overage	X				X
Unqualified - Underage				X	

b. You can wade through each record from the **Find** screen and approve each disposition code or you can simply reassign the records to yourself and use the **Create List** to access each record and approve the disposition. Since you already know how to use the **Find** screen to review each record, this process will show how to reassign the record, create a list, and update the disposition code.

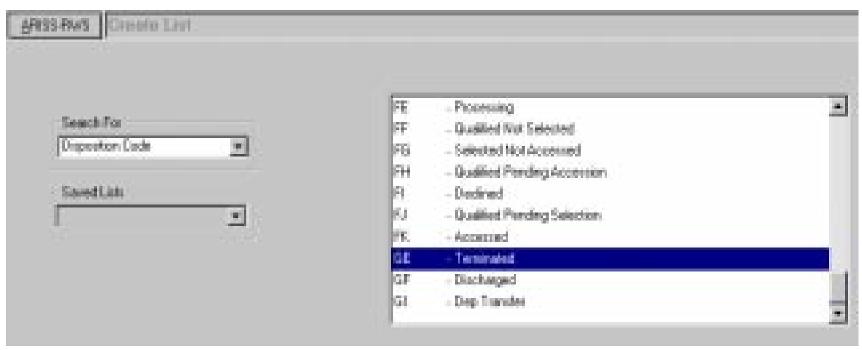
✓ With RWS Update 4, you no longer need to reassign these records to yourself. The new Create List for the SC will allow you to approve those records with a final disposition code quickly.

23-3. Review records with create list.

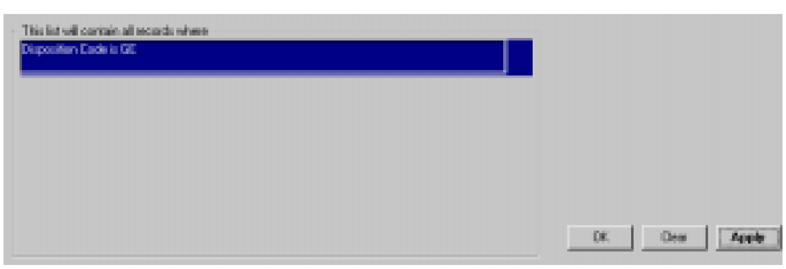


a. Once you have replicated, go to the **Find** screen. From the **RSID** list select your name and then select **Find Now**. This will show that those records are now assigned to you. Now click **Cancel**. This should bring you to the **ARISS-RWS** main screen. Click on the **ARISS-RWS** tab and then select **Create List** from the **MISCELLANEOUS** folder. The **Create List** screen will appear for you to establish your **Search For** criteria.

b. The **Search For** drop-down arrow will show all of the data fields that can be selected to make your search as general or specific as you need. When you have identified the **Search For** item, another box will appear for you to further identify the parameters of your search. You can select more than one item from the parameters identified under the **Search For** criteria. You can do this by clicking on the first item and then holding down the ***Shift*** key and clicking on the last item and it will highlight all items in between. If you want to select specific items, hold down the ***Ctrl*** key and click on each item that you want as search parameters. Click **Apply** to set the search parameters.

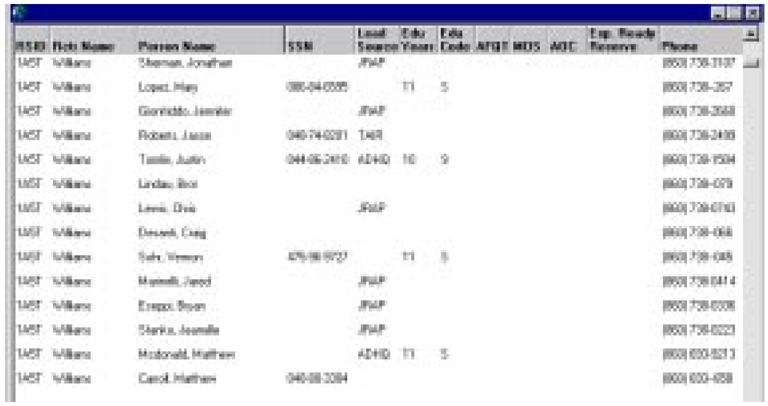


c. If you need to make a change on one of the selected parameters, highlight the item in the screen and click on **Clear**. This will remove the item from the **Search For** window. Once you have established your search parameters, click on **OK**. This will start the search.



d. You will be prompted to save your search parameters. Click **Yes** or **No**. If you select **Yes**, complete the file name information and click on **Save**.

e. Records meeting your search criteria will be displayed. Now double click on the applicant's record that you want to review. This will take you to the **Prospect Record** or **Lead Information** screen depending on the applicant's status.

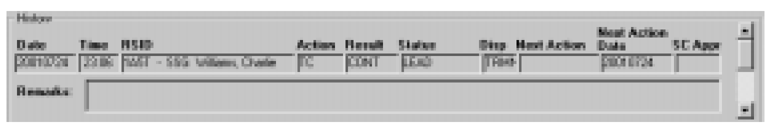


✔ If you open a Lead record and the ARISS-RWS tab is grayed out, you need to enter a Lead Source code and Save before any further actions can be accomplished.

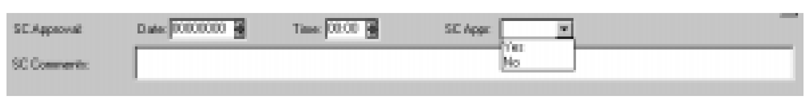
23-4. Review and approve disqualified disposition.

a. Click on the **ARISS-RWS** tab. A menu will appear, select **Contact History** from the **ADMINISTRATION** menu.

b. Using the scroll bar in the **History** section review all entries made by the recruiter, including those previously approved by you.

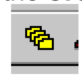
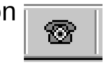


c. If the record has the correct termination code, the only action required is for you to select **Yes** from **SC Appr** and enter any comments in the **SC Comments**.



d. If the record does not have the correct **Disposition**, you will need to enter the information in the **Today** section. To reflect that you reviewed entries select the **Action** drop-down arrow and select **REVIEW**. Select the **Results** drop-down arrow and choose **CONDUCTED**. You can annotate any comments in the **Remarks** section. Ensure that the **Disposition** has the appropriate final disposition code listed.

e. To approve the actions that are annotated in the **Today** section click on the **Save** icon. This will move **Today's** action to the **History** section. If you fail to save the action before annotating the **SC Appr**, you will save only the last action in the **History** section and not the action you just completed. To move actions from **Today**, you must **Save** first and then complete the **SC Appr**. Once the correct termination code is in the **History** section, follow the approval steps we discussed above.

f. Save the record each time you approve an item. Now you want to return to the **Create List** to approve another record. To return back to the **Create List**, click on the **View List** icon.  This will return you back to your **Create List**. Continue the above steps until all records are approved with a final disposition code. Once you have completed your list select the **Telephone** icon  to replicate or select **File** and then **Replicate/Project**. The replication window will open, select **Replicate Only**.

g. You will find that this process for removing records will be faster using the reassignment and create list process when you have multiple records. This will allow you to approve several records in a short period of time and you are now using the full functions of the Leads-Reports application. There is an enhancement that will allow you to use the Create List function without the records being assigned to you. This will make the process even faster.

Chapter 24

Connect to the TOS

24-1. General.

a. The TOS is another management tool provided to assist you with:

(1) Managing your assigned ZIP Codes and schools.

(2) Reviewing your RS mission, either annually, quarterly, or monthly and by category.

(3) Requesting and printing established reports.

(4) Reassigning records when emergencies occur.

(5) Updating your RS information.

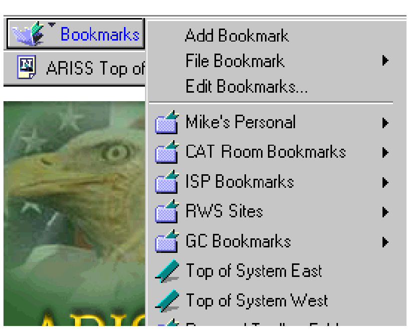
b. There are chapters covering each of these functions, but first you need to get to the TOS. I am not going to bore you with the logon process. This is one of the first chapters and if you need help review chapter 3. It will show you how to get connected to your ISP and establish a secure tunnel with PERMIT/ Client.

24-2. Connect to the TOS.

a. Once you have established a secure connection with your ISP, then click the **Netscape Communicator** icon. 

b. A **Netscape Communicator** splash screen appears as a connection is established. After the splash screen you should default to the recruiter.goarmy homepage.

✔ If another homepage appears contact your Rctg Bn IMS to reset the location.

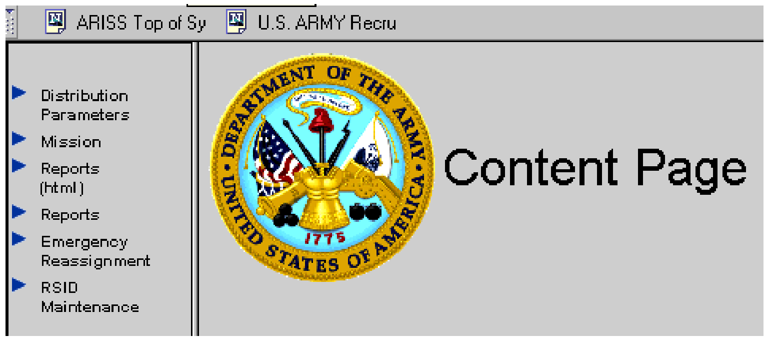


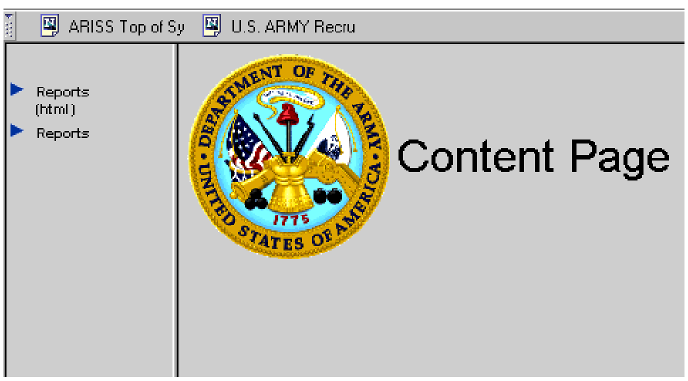
c. Click on your **Bookmarks** button and this will display your TOS link. Select the appropriate **Top of System East** or **Top of System West**.

d. If you are not sure which link to go to, right mouse click on your **VPN PERMIT/Client** icon  and see which Tier II site you are connected to. Since the **PERMIT/Client** has a check by **Tier II Eisp**, you would select **Top of System East**.

e. You will be prompted to login. Use your NT **Username** and **Password** and then click the **Logon** button to continue.

f. You will see a menu list appear on the left of the **Content Page**. You are now connected to the **TOS**. From here you can do several different functions that will be covered in following chapters. This is the SC's Content Page.





g. Compared to the Recruiter's Content Page, the SC and CLT have many more options that they are responsible for reviewing.

✔ The TOS was developed for you to review reports and conduct other important functions that have a direct impact on the ARISS-RWS Leads-Reports application and allows you and your chain of command to monitor production without interfering with the RS mission.

Chapter 25

SC Distribution Parameters

25-1. General.

a. This is one of the most important functions that you have to do. If you fail to set your leads distribution parameters properly your recruiters will not receive new leads or school lists which are imperative to mission success.

b. You, as the SC, have the ability to set the leads distribution parameters so each recruiter is able to receive leads from the TOS. You will need to assign all schools and ZIP Codes to the recruiters in your RS. This allows all new leads to be automatically downloaded directly to the individual recruiter without having to be manually transferred from any other application. This will also allow the recruiter to manage and contact the leads quickly. By having all of the schools assigned to recruiters, they will automatically receive their school lists and allow the school information screens to be updated.

✔ Your Rctg Co commander has the capability to set distribution parameters, but that should only be done if you are not available.

c. The following steps show you how to use the TOS distribution parameters to:

(1) Assign ZIP Codes.

(2) Assign schools.

(3) Share a school between recruiters.

(4) Check for unassigned records.

✔ All schools and ZIP Codes must be assigned to you or your recruiters to ensure that you do not receive unassigned leads in your ARISS-RWS Leads-Reports application.

d. You will need to connect to the TOS to work on assigning and reassigning schools and ZIP Codes. If you need assistance going to the TOS review chapter 24.

e. You will see a menu list appear on the left of the **Content Page**. Click on **Distribution Parameters** to review or assign ZIP Codes or schools to your individual recruiters.

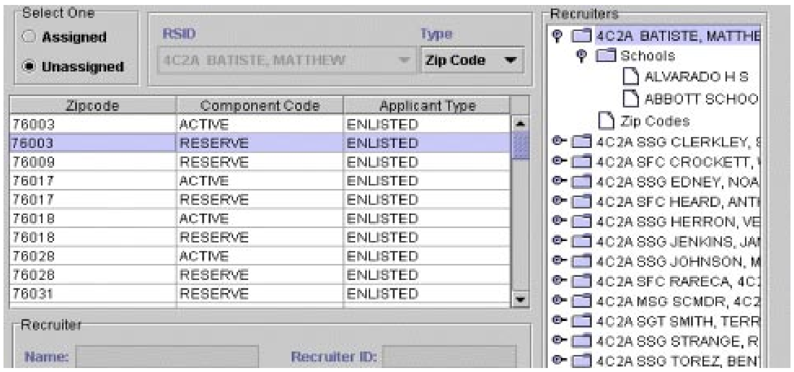
25-2. Assign ZIP Codes.

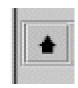
a. Assigning ZIP Codes will allow leads to be assigned and downloaded to your recruiters. ZIP Codes cannot be split among recruiters but can be split between RSs. If an RS has a ZIP Code that is split with another RS then both RSs will have the ZIP Code listed. Your recruiter will receive leads based on the ZIP Code split percentage that is entered in FAZR by the recruiting brigade during the recruiting market analysis.

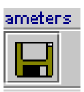
✔ You may see a ZIP Code listed twice in the unassigned screen. One ZIP Code is for your RA recruiter and the other ZIP Code is for your USAR recruiter. You cannot assign a USAR ZIP Code to an RA recruiter or an RA ZIP Code to a USAR recruiter. If your RS does not have an authorized USAR recruiter then you will not have USAR ZIP Codes on the list. The RS that covers the USAR mission will have those ZIP Codes.

b. Select **Unassigned** then choose **Zip Code** from the **Type** drop-down arrow.

✔ If this is the first time you are assigning ZIP Codes to a recruiter, you will need to reassign those unassigned leads that have accumulated in your ARISS-RWS Leads-Reports application (see below).

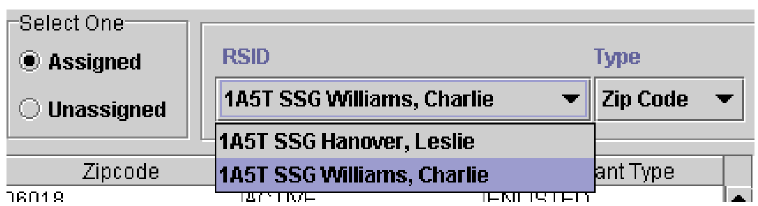


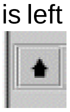
c. Any unassigned ZIP Codes will appear. To assign an unassigned ZIP Code, click once on the **Recruiter's Name** that you want the **ZIP Code** to be assigned to. Click on the **ZIP Code** that you want to assign. Click the **Assign** icon  that is now active.

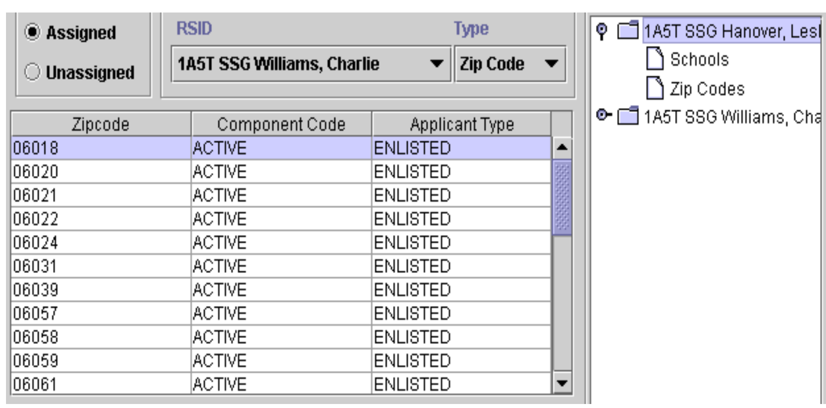


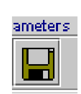
d. Select the **Save** icon. The ZIP Code will now move from the unassigned list to the selected recruiter's ZIP Code folder. To check that the ZIP Code is now assigned to the recruiter, select the **key** beside the recruiter's name and then click on the key next to the **ZIP Code**. You will see that the ZIP Code is now listed under that recruiter. Repeat the steps and assign all unassigned ZIP Codes to your recruiters.

e. If you want to make changes and move an **Assigned** ZIP Code from one recruiter to another, just click on **Assigned**. From the **RSID** drop-down arrow select the recruiter that you want to reassign a ZIP Code from.

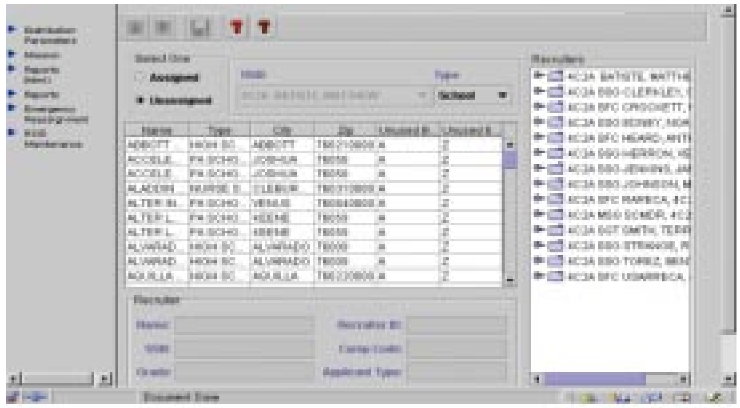


f. Click once on the **ZIP Code** that you want to reassign and then click on the **Recruiter's Name** that you want to reassign the ZIP Code to. All that is left is to click the **Assign** icon. 



g. Once you have completed all of the changes that you need to make, click on the **Save**  icon. It is recommended that you save after each change. The choice is yours.

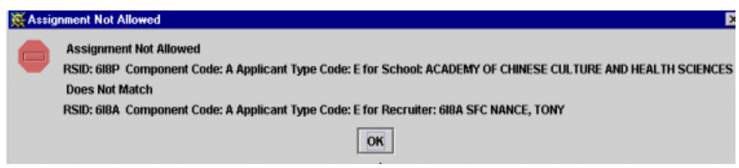
25-3. Assign schools.



a. To check for unassigned schools, click on **Unassigned** and then select **School** from the **Type** drop-down arrow. This will show all schools that have not been assigned. Remember that some schools will be listed twice. One will be for your RA recruiters and the other will be for your USAR recruiters. Contact your Rctg Bn FAZR representative to add missing schools or to correct school information.

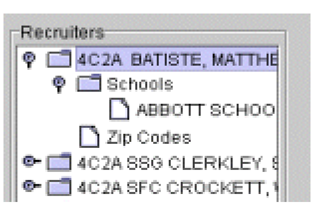
b. Choose a **Recruiter** that you want to assign a school to by clicking on the recruiter's **Name** one time. Select the **School** that you want to assign by clicking on the school **Name**. Select the **Assign** button  that is now active. You have now assigned that school to your recruiter.

c. If there is a problem with the school you are trying to assign, an error message will appear. It will give you the reason for not allowing the assignment.



✓ This may occur when trying to assign a school or ZIP Code designated as USAR to an RA recruiter or designated as RA and trying to assign it to a USAR recruiter or trying to reassign outside of your RS's area.

d. It is recommended that you click on the **Save** icon  after assigning each school. To verify that the school is now assigned to that recruiter click on the **key** next to the recruiter's name.

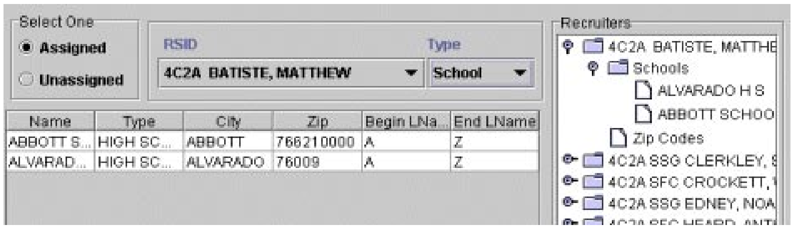


e. If there is no key symbol or the folder is clear, nothing has been assigned to that recruiter. To check, click on the **key** next to the **Schools** folder. The school will now show in the recruiter's school folder. If you did not save already, click on the **Save** icon and continue the process to assign all schools to your recruiters.

25-4. Share a school between recruiters.

a. If you want to share an HS between your recruiters, all you need to do is further define the distribution. You can split a school between two or more recruiters. This can be done to share a large HS or allow all the recruiters to share a college. This will allow the recruiters to receive leads based on the parameters assigned. Recruiter "A" would receive leads whose last names begin with the letters A through L and recruiter "B" would receive leads whose last names begin with the letters M through Z.

✔You must assign the school you want to split to one recruiter first before the split can be done.

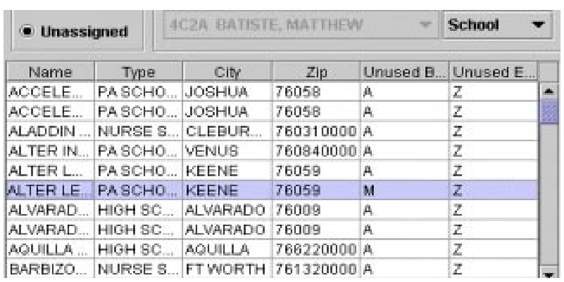


b. To split a school first select **Assigned**. Click on the **Type** drop-down arrow and select **School**. Now click on the **RSID** drop-down arrow to select the **Recruiter** that has the school assigned.

c. Click once on the school that you want to split between recruiters. Now you need to determine what part of the alphabet that you want to assign to that recruiter. You can do this by making changes in the **Begin LNa**(me) or **End LName**. To change the **Begin LNa**(me) **or End LName** click on the letter in that column. An alphabet scroll window will appear. Select the letter of the alphabet that you want the recruiter to receive. An example would be from A through L. Once you have selected the letter click on the **Save** icon. The remaining portion will move to the **Unassigned** screen.

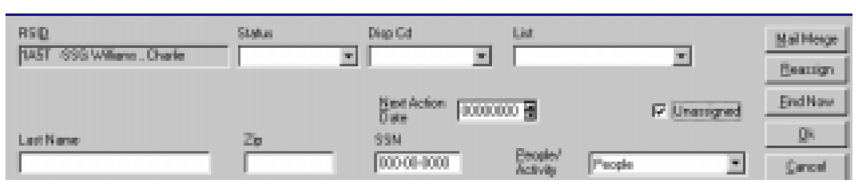
✔You do not have to select the Assign icon for the change to take place. The change will take affect once the school has been split and saved.

d. To assign the remaining portion of the school, select **Unassigned**. You will now see the remaining portion of the **School** that needs to be assigned. Select the recruiter that is getting the other part of the school and click on the **Assign** icon. This is just like you were assigning an unassigned school that we just covered. If you want you can continue to split the school among other recruiters. Just change the letters in the **Unused B**(egin) or **Unused E**(nd) column. Once you have finished the assignments, ensure that you click on the **Save** icon.



✔You will receive an error message if you try to assign the same letter or letters to two different recruiters.

25-5. Check for unassigned records. Now that you have ensured all ZIP Codes and schools are assigned at the TOS, you need to check your **ARISS-RWS Leads-Reports** application for any unassigned records. To check for unassigned records, open your **ARISS-RWS Leads-Reports** application and go to the **Find** screen. Click on the **Unassigned** box and then click on the **Find Now** button. A separate screen will appear with any unassigned records. You will need to reassign these records to your recruiters. Review chapter 21 on reassigning unassigned records if you need assistance with this process.



Chapter 26

SC Mission

26-1. General.

a. This feature will allow you to review the mission that is received from your Rctg Co. With the RS mission concept this screen is for your information only. However, if we ever go back to recruiter mission, then this chapter will be published with the step-by-step instructions on how to issue mission to each recruiter.

b. The following steps show you how to use the TOS mission to:

(1) Understand your RS mission.

(2) Set mission parameters.

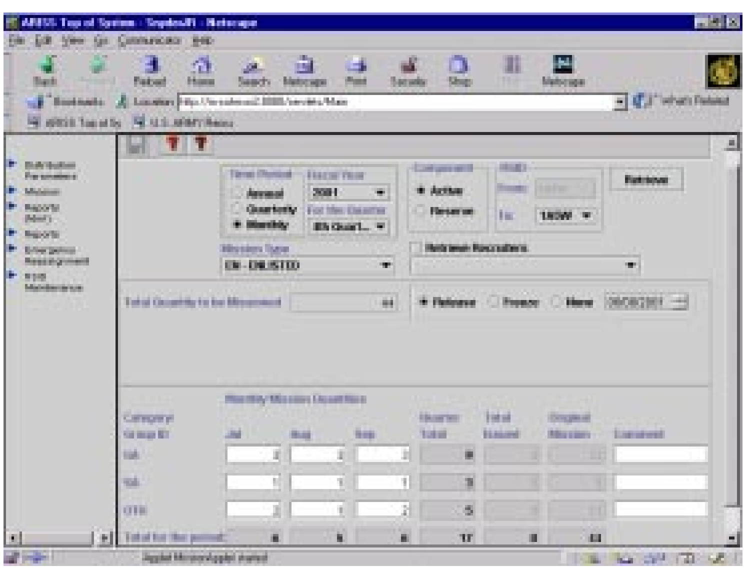
(3) Review your mission objective.

✓Currently the Mission screen is for your information only. With the new RS mission concept, your RS mission will be listed for your review only.

26-2. Understand your RS mission.

a. You will need to connect to the TOS to review your RS mission. If you need assistance going to the TOS review chapter 24.

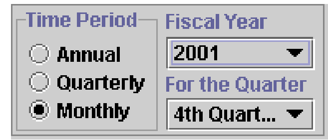
b. You will see a menu list appear on the left of the **Content Page**. Click on **Mission** to review the mission that you are responsible for.

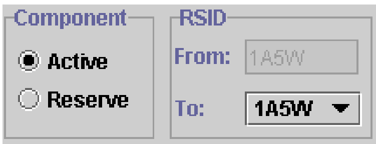


c. This screen will be used by your CLT to assign the RS mission for the different quarters. This is the same interface your CLT will use to assign the mission to your RS.

26-3. Set mission parameters.

a. You can set parameters for the time period and fiscal year you want to retrieve. **Annual** is already selected, but you can select **Quarterly** or **Monthly** depending on your search. Select a fiscal year from the **Fiscal Year** drop-down arrow and select the quarter from the **For the Quarter** drop-down arrow.





b. Click on the **Active** or **Reserve Component** to identify which mission you want. There is nothing to select from the **RSID** drop-down arrow, this should show your RS's RSID. After you have set your search parameters, click the **Retrieve** button.

c. The mission that was assigned to you by your Rctg Co is now visible. Take a few minutes to look over the information. You may need to use the scroll bar on the side to see the bottom of the screen.

✔ You can see the Annual, Quarterly, or Monthly mission that has been assigned by changing the Time Period, Fiscal Year, and Quarter.

26-4. Review your mission objective. You are looking at the fourth quarter mission for an RS. You can review the information on the screen and see the **Total Quantity to be Missioned** and the date it was **Release**(d) to your RS. The remaining information on the **Monthly Mission Quantities** should be self-explanatory. If you have any questions about the mission numbers contact your Rctg Co commander or 1SG.

✔ The same information can be found under Reports (html), Mission. The report that you will want to review is the Monthly and Quarterly Mission Box.

Chapter 27

Generate TOS Reports

27-1. General.

a. Understanding the different Reports from the TOS will save you several hours in your daily activities. Instead of manually preparing reports for your CLT, you can now go online to the TOS. In some cases you can e-mail the report directly to the requestor.

✓There are two locations for Reports at this time. But shortly all reports will be listed under Reports (html).

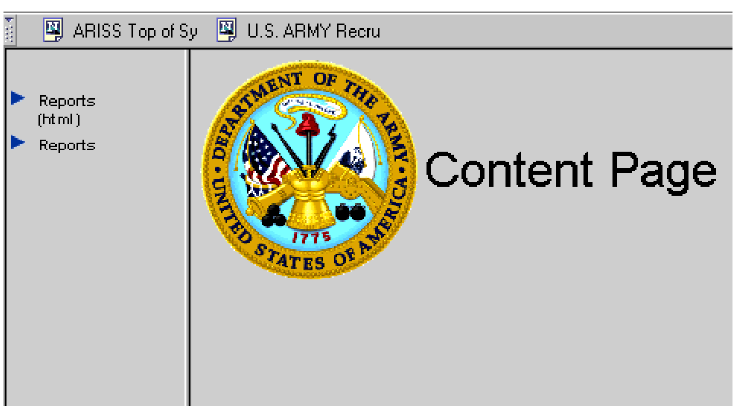
b. You will need to connect to the TOS to generate selected reports. If you need assistance going to the TOS review chapter 24.

c. You will see a menu list appear on the left of the **Content Page**. You are now connected to the **TOS**. From here you can start requesting reports. If you login and do not see any categories, then your IMS has not given you an ARISS role. Depending on the ARISS role that your IMS gave you, you may see other categories other than reports and there may be several waivers showing under the Department of the Army emblem. But that is another user manual and will not be discussed here.

✓You probably noticed that the menu shows Reports (html) and Reports. There is nothing under Reports and the category will be removed shortly.

✓The TOS was developed for you to review reports and conduct other important functions that have a direct impact on the ARISS-RWS Leads-Reports application and allows you and your chain of command to monitor production.

27-2. Reports.



a. You will see a menu list appear on the left of the **Content Page**. Your **Missions, Production, Awards,** and **Leads** reports are shown under **Reports (html)**. The objective is to have all reports in a hyper text markup language (html) format. The difference between a regular report and an html report is the speed in which the information will appear.

b. IMPORTANT: The speed to generate your report is directly tied to the amount of information that you are requesting and your local area network or dialup connection speed. This is not to say that you cannot get a report, just remember that it may take a few moments more if the local area network or dialup is busy with other activities and/or you are asking for a large quantity of information. If you ask for recruiting brigade (Rctg Bde) only information the report will run much faster than if you ask for information listing each recruiting company (Rctg Co) within the Rctg Bde because the system will have to query for each Rctg Co separately.

✓You probably noticed that the menu shows Reports (html) and Reports. There are a few reports for Army Medical Department being converted to html and once that is completed the Reports category will be removed.

✓You may not see some of the reports shown in this chapter. Reports are available based on your ARISS role.

c. If you click in **Reports (html)** you will see the different categories that you can pull reports from. Before we go too far, you need to understand that **Awards** Reports are now just being redesigned. The reports, if used, may provide incorrect information.

d. Click on the Report category to view the different reports. Before we discuss how to get a specific report, let's take a few minutes and review some of the reports that are available under each category.

e. These are some of the reports that you will find under **Missions**. The number of reports that you will see is directly related to your ARISS role.

f. These are some of the reports that you will find under **Production**. The number of reports that you will see is directly related to your ARISS role.

g. These are some of the reports that you will find under **Awards**. The number of reports that you will see is directly related to your ARISS role. These reports are currently not working.

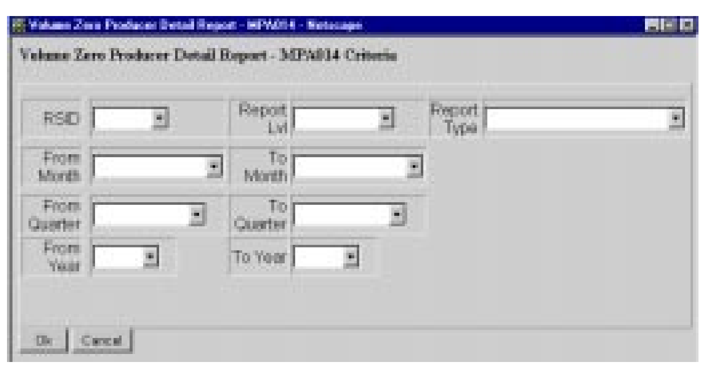
✔Remember the reports you see here are the same ones that the leaders and staff in your chain of command see. The information that is shown on the report is directly tied to the ARISS-RWS Leads-Reports application. If you or your recruiters are not using the application correctly, your reports will not contain accurate information.

h. These are some of the reports that you will find under **Leads**. The number of reports that you will see is directly related to your ARISS role.

i. You are probably wondering what data is used to generate the information on each report. For those reports shown under **Missions**, **Production**, and **Awards**, the data comes from ARISS applications called MPA, GCSales, and in the future GC-Redesign.

j. The data on the **Leads** Reports comes from recruiters and SCs using the ARISS-RWS Leads-Reports application. Most of the information comes from updating the Contact History screen. This is why it is stressed to recruiters and SCs to update and follow the processing steps of assigning the correct Status, Action, Result, and Disposition to each record being processed.

k. Once you click on a report, you will see a Criteria screen appear. The Criteria screens will differ in appearance. You will need to select what information you want and timeframe for your report. Here are a couple of examples of Criteria screens that you may see depending on the report you are requesting.



l. Most of the information is self-explanatory, but we need to take a few minutes to identify a few of the features of the different criteria screens. In the near future, all criteria screens will look something like the one above on the left of the previous page. Selecting the criteria will be basically the same, but you will have the ability to view the report in **HTML** or **Excel**. Basically the **HTML** format is nothing more than a screen shot of the report and its data. While **Excel** provides the same information, you have the ability to manipulate the data in format appearance, and create pivot tables, charts, and graphs. As a rule, if you want to review the report and do not need it for reference, use **HTML**. If you want to save the report for future reference, create the report in **Excel** and save it to your hard drive. You can also create a legend with the report. This will detail the codes that are used on any of the reports. Additionally, one of the best features with the Criteria screen above on the left of the previous page is the ability to e-mail a report to yourself or to anyone within the command.

m. On some of the Criteria screens, like the one above on the right of the previous page, you will notice that there are several different selection fields. This can be confusing. If you complete too much of the screen or too little, your report may not show any information. So let's take some time to identify some of the different input combinations needed to request a report.

(1) **RSID**. You can select an **RSID** and the report will, if requested on **Report Type**, give you a rollup of that RSID and all subordinate RSIDs.   Remember, on the **Leads** Reports you can only see two levels down, so if you are a Rctg Bde user you will only see RSIDs of your Rctg Cos. For the other reports you can select individual RSs if you so desire. Select the RSID you want.

(2) **Report Lv**. This identifies what level you want the report to detail the information. For example, suppose you are a Rctg Bde user and you select your Rctg Bde RSID, the report level can be **BRIGADE**, **BN/DET**, or it can be **CO/HCRT**. If you select **BN/DET** you will only get a rollup of each Rctg Bn. If you select **CO/HCRT** you will get the Rctg Bn information along with a breakdown by Rctg Co.   If you select **STATION**, your report will be blank because you are only authorized to go down two levels and as a Rctg Bde user RSs are three levels down.

(3) **Report Type**. This usually identifies whether you want a report by month, quarter, or year. The report type you select will determine what additional fields need to be completed on the Criteria screen. For example, if you request a **Monthly** report, fill out ONLY the fields related to pulling a monthly report.

(4) **From Month** and **To Month**. Only selected when requesting a monthly report or a month-to-month report. You will not complete these fields if you are looking for a Quarterly or Annual report. If you want only one month, show the same month in both the **From Month** and **To Month** fields.

✔ All months are to be entered as using fiscal year (i.e., if requesting information for December 2001, you must select year 2002 because December 2001 is in fiscal year 2002). In this case, if you select 2001 an error will result.

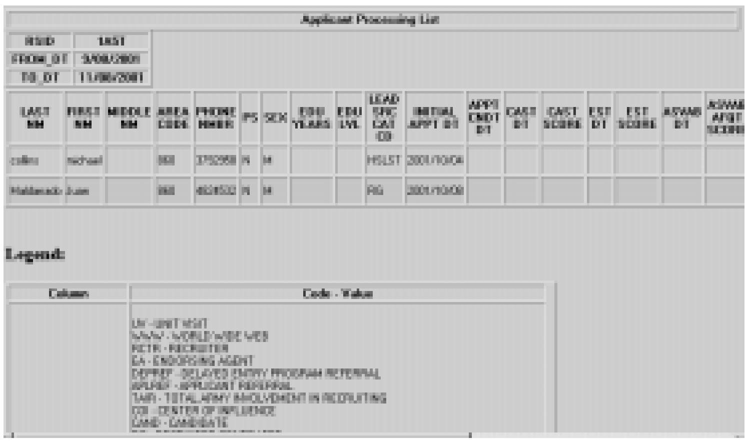
(5) **From Quarter** and **To Quarter**. Only selected when requesting a quarterly report or a quarter-to-quarter report. Do not enter data in these fields if you are looking for a monthly or annual report. If you want to show information for only one quarter, show the same quarter in the **From Quarter** and **To Quarter** fields.

(6) **From Year** and **To Year**. This field is based on fiscal year and not calendar year. These fields will be required for all monthly, quarterly, and annual reports. This will be the confusing field when trying to pull reports for a fiscal year. Remember, even though the month is in a calendar year, this field is looking for the fiscal year. For example, you want data for this past December. If you enter December 2001, you will get fiscal year 2001 December data and not fiscal year 2002 December data. To get this past December data you would enter ***December*** in the **Month** field and enter ***2002*** in the **Year** field.

(7) **Recruiter Information** or **SSN**. CAUTION!! If you select or enter information in these fields, you will receive a blank report. The reason they are showing is directly tied to the old way we issued mission. These fields will be removed as the reports are updated. Do NOT enter this information!

n. Once you have completed the Criteria screen and made the necessary selections, click **Ok** to run the report. Depending on the amount of information that you requested, it may take a few minutes for your report to appear. For those reports converted to the new Criteria screen, instead of waiting, you can select to have the report e-mailed to you when it is completed.

✔ The reports listed under Missions will provide information at the RS, Rctg Co, and Rctg Bn level. With the RS mission concept, no mission information is available at the recruiter level.



o. There may be different criteria to select when generating a report, but each report is generated basically the same. Take a few minutes and request a couple of mission, production, or leads reports to see what information they provide.

✔ Remember, if the report is blank you may have entered the wrong criteria. Review the rules above and try again.

p. If you requested an HTML report you will need to scroll to the bottom of the report to either **Print** or **Close** the report. If you decided to print the report, check your print properties to ensure you are printing in **Landscape** and not in **Portrait**. You can close the report by clicking on the **"X"** in the top right-hand corner, but be careful on what **"X"** you click, you may accidentally close the Netscape application. If you requested the report in Excel, you can use the MS functions associated with that application.

q. IMPORTANT! The reports currently available should provide the necessary management information for you. But it requires recruiters and SCs to keep the ARISS-RWS Leads-Reports applicant records updated and accurate along with the GC properly coding and updating GCSales. After all, the data is only as good as its source. By ensuring this everyone will spend less time manually creating or correcting reports.

Chapter 28

SC Emergency Reassignment

28-1. General.

a. This is one of those functions that you hope you never have to do. You will use this process only when your recruiter is not available to replicate. There will be times that your recruiter will go on emergency leave, temporary duty, or get relieved and you will not have a chance to complete the normal reassignment process. If you are not familiar with this process see chapter 20 on SC reassignment of records.

✔Do not use this function to circumvent the normal reassignment of records when both recruiters are available.

b. The following steps show you how to use the TOS emergency reassignment to:

(1) Reassign records in Leads-Reports.

(2) Connect to the TOS.

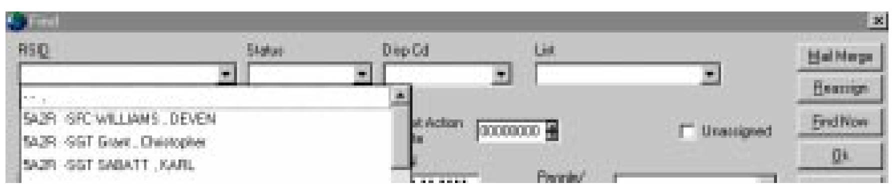
(3) Identify reassignment from information.

(4) Identify reassignment to information.

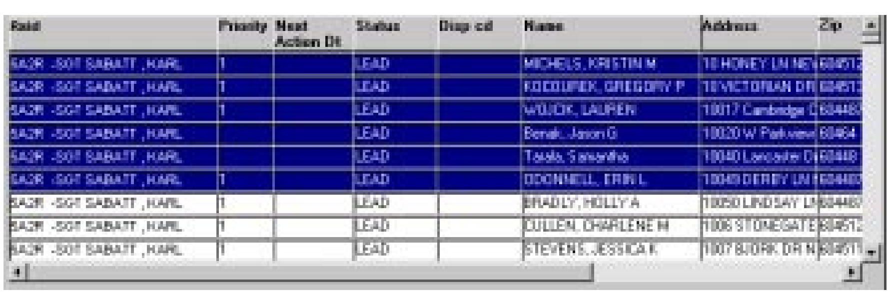
28-2. Reassign records in Leads-Reports.

a. Before you can complete an emergency reassignment of records you have to identify the records in ARISS-RWS Leads-Reports. Open **Leads-Reports** and go to the **Find** screen, select **File** and **Open** from the menu bar or click on the **Open** icon. 

b. From the **RSID** drop-down arrow, you need to select the recruiter that you will transfer records from. Select **Find Now**.

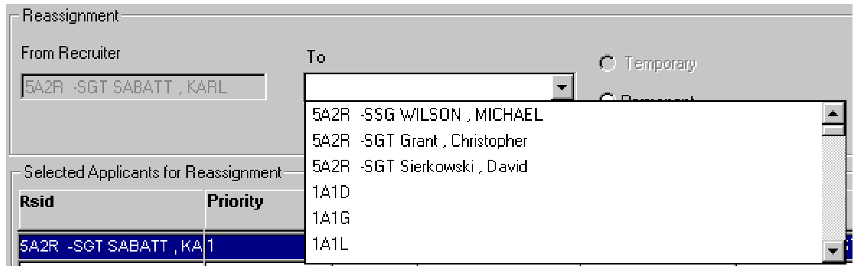


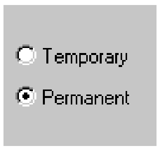
c. This will display the records that are assigned to the selected recruiter. Select the applicant's record or records you will be reassigning by clicking on the name once. The line should turn blue. Click on the **Reassign** button  to continue.



✔You can select all the records by choosing the first record and scrolling to the bottom of the list (while holding the ***Shift*** key) and clicking on the last record.

d. The **Reassignment** screen will appear with all the records that you have selected. The **From Recruiter** will be grayed out and should be the recruiter you selected from the previous screen. From the **To** drop-down arrow, select yourself as the individual you will be transferring the record or records to. It makes no difference during an emergency reassignment, you will select the actual **To** individual later.





e. You will select **Permanent** reassignment.

f. Select all records and then click the **Apply** button. You will see those records disappear and the **Reassignment** screen will close and you will be returned to the **ARISS-RWS** main screen.

You can select all the records by choosing the first record then scrolling to the bottom of the list (while holding the ***Shift*** key) and selecting the last record.

g. To complete the reassignment process, select **File** from the menu bar and then **Replicate/Project**. The projection and replication window will appear, select **Replicate Only**.

28-3. Connect to the TOS.

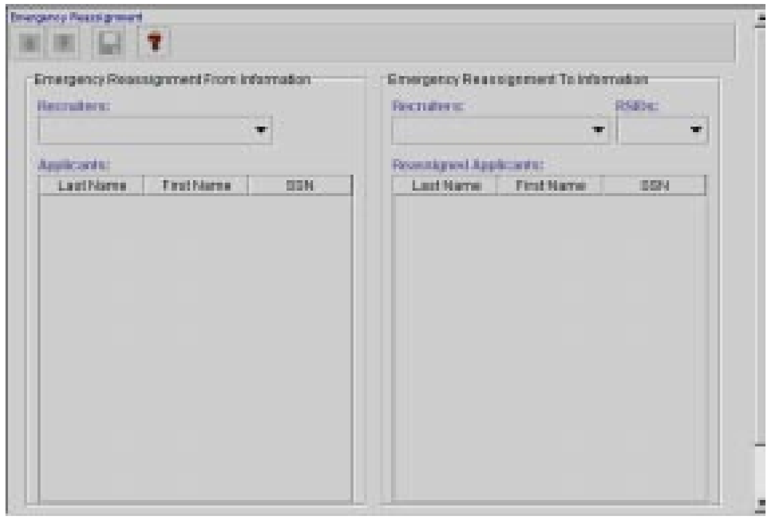
a. You will need to access the TOS to complete the reassignment process. If you need assistance going to the TOS review chapter 24 on connecting to the TOS.

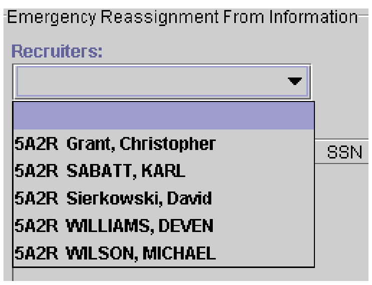
b. You will see a menu list appear on the left of the **Content Page**. Click on **Emergency Reassignment** to complete the reassignment process.

After you replicate with Leads-Reports, give the system time to process and flag those records for reassignment.

28-4. Identify reassignment from information.

a. When you first open the **Emergency Reassignment** screen, you will need to select the **Recruiters** that records will be reassigned from.

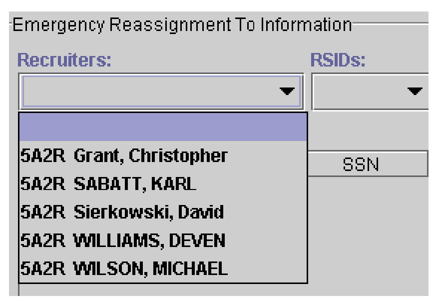


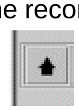


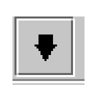
b. Click on the **Recruiters** drop-down arrow and select the recruiter that you just reassigned the records from in Leads-Reports. Once you select the recruiter, those records will show in the **Applicants** field.

28-5. Identify reassignment to information.

a. Now you will need to select the recruiter that you are going to reassign the records to. If you know the individual is going to return or a replacement will be assigned in a short period of time, you may want to reassign these records to yourself and then you can manage what goes to which recruiter. If not, select the recruiter you want to receive the records from the **Recruiters** drop-down arrow. You will notice that you can do an emergency reassignment to another RS. For example, you lost your USAR recruiter and another RS is now assuming your USAR mission. Changes were made in another application to ensure the new RS will receive the new leads, but you have all of the records from your old USAR recruiter. Instead of assigning those records to your recruiters, select the appropriate **RSID** from the drop-down arrow.



b. After selecting the **From** and **To** recruiters, highlight the records being reassigned under the **Reassignment From** recruiter and then click on the **Assign** icon.  The records will now show under the **Reassignment To** recruiter or **RSID**.

c. If you made a mistake and did not want to reassign records to that recruiter, all you need to do is highlight those records under the **Reassignment To** recruiter and then click the **Unassign** icon.  Once you have reassigned all records shown under the **Reassignment From** column click on the **Save** icon.  After you have saved the **Emergency Reassignments**, inform your recruiters that they will receive these records the next time they replicate.

Chapter 29

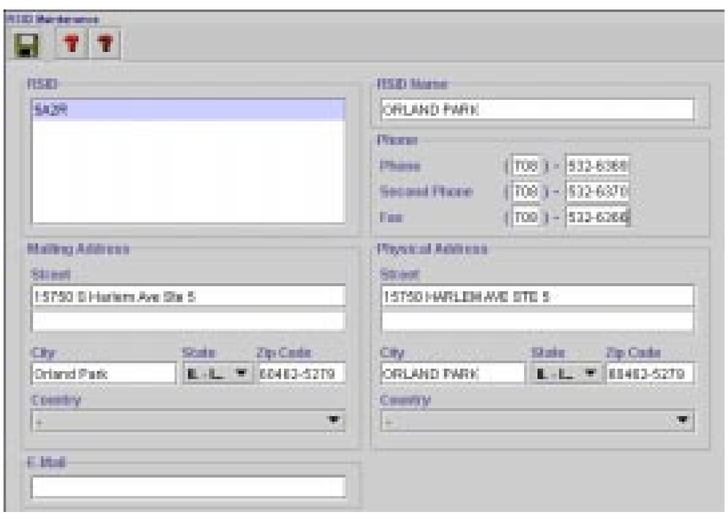
SC RSID Maintenance

29-1. General. This function will allow you to update the address information for the RS. If an RS moves or is having the mail delivered to another address, you can make the changes to the information. The Rctg Bn FAZR clerk normally updates the address information, but you can do it from this screen.

29-2. Procedures.

a. You will need to connect to the **ARISS Top of Sy**(stem) to generate selected reports. If you need assistance going to the TOS review chapter 24 on connecting to the TOS.

b. You will see a menu list appear on the left of the **Content Page**. Click on **RSID Maintenance** to review the information you can change.



c. Review the information on the screen and make any corrections or add any missing information. Usually, the Rctg Bn FAZR clerk will update this information, but you can make changes if necessary. You are limited on the information that you can change but once you correct or add information to this screen, just click on the **Save**  icon.

Chapter 30

Change Your NT Login ID Password

30-1. General.

a. Every now and then you will be prompted to change your password. What an inconvenience! Just when you have them committed to memory, you are asked to change it. This is not someone wanting to mess with you, but a regulatory requirement to change it every 180 days. This process will not change your ISP or PKI password, but will change the password you will use to login to your laptop, ARISS-RWS Leads-Reports application, the TOS, and your e-mail.

This process is for recruiters and SCs that use dial-up to access the TOS, e-mail, and replicate with the ARISS-RWS Leads-Reports application.

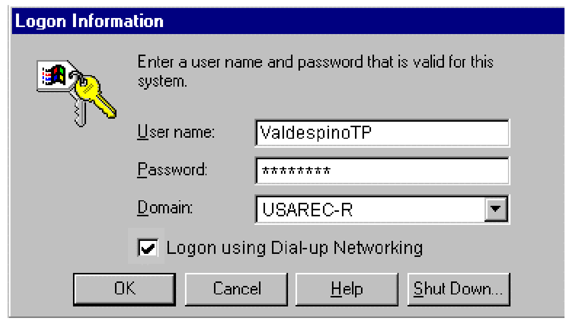
b. There are three steps to establishing the connectivity and replicating. They are:

(1) Connecting to the network.

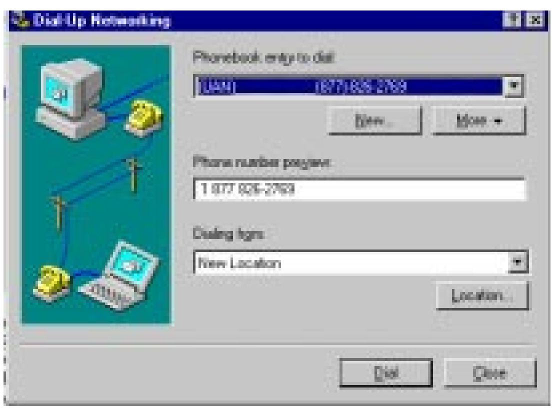
(2) Changing your password.

(3) Verifying your new password.

30-2. Connect to the network.



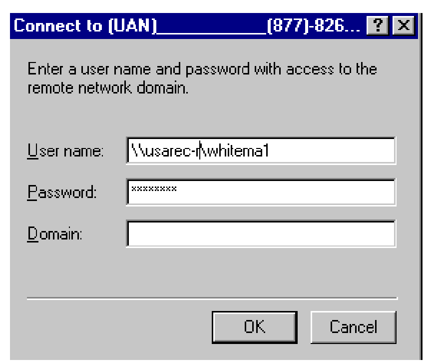
a. Before you start, you will need to connect a telephone line to your modem. Once this is done, reboot your laptop and get to the initial login screen. You will need to enter your **User name** and **Password**. Ensure the **Domain** window is showing **USAREC-R**. Click on the box next to **Logon using Dial-up Networking**. Now click **OK**.



b. The **Dial-Up Networking** screen will appear. From the **Phonebook entry to dial**, click on the drop-down arrow and select **UAN**.

Do not use your ISP account to change your password. You must connect through the UAN.

c. The telephone number should be the one shown in the example. If you need to dial a number to get an outside line (7, 9, etc.,), click in front of the telephone number and add it, followed by a comma. Click the **Dial** button.



d. The **Connect to (UAN)** screen will appear. You will need to enter your NT login information to connect. There are a few changes on this screen that you need to be aware of. Start by entering **\\usarec-r\nt login id**. Do not use the **User name** that is already there. In the **Password** box, enter your current NT login ID password. As you enter your password, asterisks will appear. Under **Domain**, make sure this box is blank. Once you connect to the UAN, the screen looks like our example, click **OK**.

✔Notice that you can no longer save your password for later use.

e. A small box will appear showing that you are connecting to the UAN and then it will show that it is trying to verify your user name and password. You are now connecting to your ISP. If you entered your information correctly, the system then registers your computer on the network and you will get a message stating that you are connected.

f. If you get an error message, try to resolve by doing the following:

Error 5: Make sure the user name and password is entered correctly and remember that it is case sensitive. Make sure you have nothing entered in the domain field. If you continue to get this error your account may be locked. Contact your Rctg Bn IMS or the SOC for further assistance.

Error 633: This usually means that you didn't hang up the previous connection. Right mouse click on the telephone icon and select hang up.

Error 678 or 692: Make sure the user has the correct telephone number to dial the UAN.

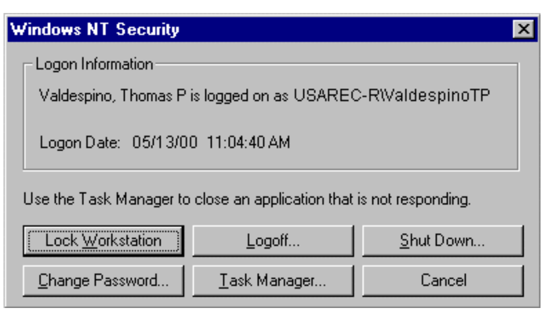
Error 718: Make sure the domain field is blank. If there is anything in the domain field the connection will not be made.

Error 734: Right mouse click on the telephone icon and select Edit Entry and Modem Settings. Next select the Security Tab and on the tab, have them select Accept Any Authentication Including Clear Text and hit OK to save changes.

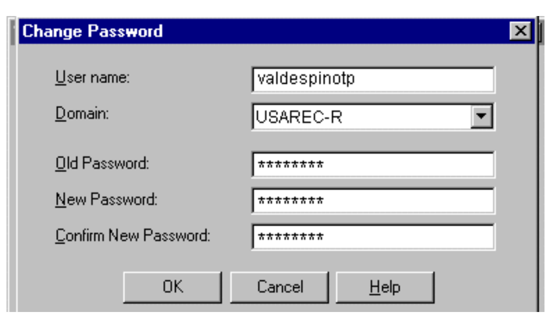
g. Once the UAN connects it will say Logon in progress and when finished, will bring you to your desktop. The Asset Management Agent program may run the first time you dial-in. It does this each time you restart your computer. It will check your hard drive to ensure all required programs and files are installed. It will also check for and report any unauthorized programs that you have installed to your system administrator. There is no problem with using your laptop while Asset Management is running; however, using applications that require the network (i.e., replication, e-mail, or Internet), may cause these applications to run slower due to the amount of resources being used by AMO. Normally, AMO will take around 4 minutes to run and should be allowed to complete its operation prior to using other applications that would use the network.

30-3. Change your password.

a. When this is done hold down the ***Ctrl, Alt***, and ***Delete*** keys at the same time. This will bring up the **Windows NT Security** screen. Click on the **Change Password** button.



b. The **Change Password** screen will appear with your **User name** and **Domain** already filled in. All you need to do is complete the next three fields. Enter the ***password*** that you used to access your laptop and connect to the UAN in the **Old Password** field. Hit the ***Tab*** key and now enter your new ***password*** in the **New Password** field. Hit the ***Tab*** key again and reenter that same password in the **Confirm New Password** field. Once you have finished, click on **OK**.



✔The new password must be eight or more characters long and out of these eight characters, two must be numbers. Remember that your password is case sensitive so check to see if the ***Caps Lock*** key is on or off.

✔The system will remember your last five passwords, so you must use something new.

c. A message will appear saying your password has been changed. Select **OK**. All you need to do now is click **Cancel** on the **Windows NT Security** screen and then hang up your UAN connection.

d. To hang up your UAN connection, find the telephone icon on your system tray. Right mouse click on the icon. Move your cursor to **Hang up** and then click on **UAN**. You will see another screen prompting you to confirm, click on **Yes**.

✔If you get an error then please read it carefully, you may have simply tried to use a password that you have already used in the past. If so, then just try it again with a different password. If you are still receiving an error message, contact your Rctg Bn IMS for further assistance.

30-4. Verify your new password. To verify that you were successful, reboot your laptop and log back in. You should have no problems. Once you are at your desktop, click on the **ARISS-RWS Leads-Reports** icon and login to the application. If your were successful, the application will open.

Chapter 31

Electronic Mandex

31-1. General.

a. Since deployment, you have identified improvements and functions that would make the application better fit the recruiting process. One of these improvements involved populating your scheduled appointments from the ARISS-RWS Leads-Reports application to your MS Outlook calendar. Through the previous chapters we identified the Send to Outlook box on the different screens. If the box is checked those scheduled appointments and completed actions will automatically be recorded on your MS Outlook calendar.

b. There are several ways to set up your calendar and how to use it. Do you set up your calendar on the server or on your laptop? Do you share your calendar and if so how do you do it? These questions are being addressed now and a decision will be forthcoming. Until then, the below steps will set up your calendar on your laptop. If someone wants to review your calendar, all you will need to do is print the calendar from your laptop. Once a decision is made, we will make the changes to this chapter and let everyone know if this is how we will do it or if you should set up your calendar differently.

c. There are three steps to establishing your MS Outlook calendar and keeping your calendar up-to-date.

(1) Establish an MS Outlook account.

(2) Set up of MS Outlook.

(3) Printing your MS Outlook calendar.

d. You will need:

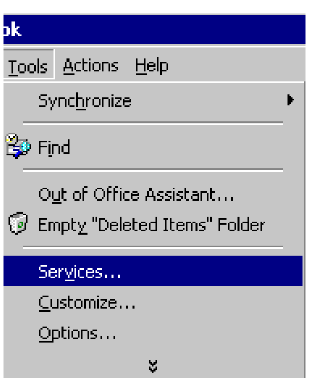
(1) Your NT login ID and password.

(2) Your ISP login ID and password.

(3) Your PKI login ID and password.

31-2. Establish an MS Outlook account. Every recruiter and SC should have a by-name e-mail account established during their initial processing. If you do not know or do not have an e-mail account, you need to contact your Rctg Bn IMS immediately.

31-3. Set up of MS Outlook.



a. The first thing that needs to be checked is where your e-mail is being delivered. MS Outlook should be set up to deliver your mail to your Personal Folders. To see where your mail is being delivered, open **MS Outlook**. Once **MS Outlook** is opened, click on **Tools** from the menu bar and then click on **Services**.

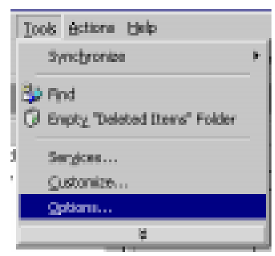
b. The **Services** screen will appear showing what services are in your profile. You should see **Microsoft Exchange Server, Outlook Address Book, Personal Address Book,** and **Personal Folders**.

✔ If any of these are missing contact your Rctg Bn IMS for assistance.

c. You need to click on the **Delivery** tab. The **Deliver new mail to the following location** field should show **Personal Folders**. If not, click on the drop-down arrow and select that folder. Now click **OK**.

✔ If you are seeing something different than what is shown here, you may need to contact your Rctg Bn IMS or recruiter trainer for further assistance.

d. Click again on **Tools** and then click on **Options**. When the **Options** screen opens, you will need to click on the **Mail Services** tab.

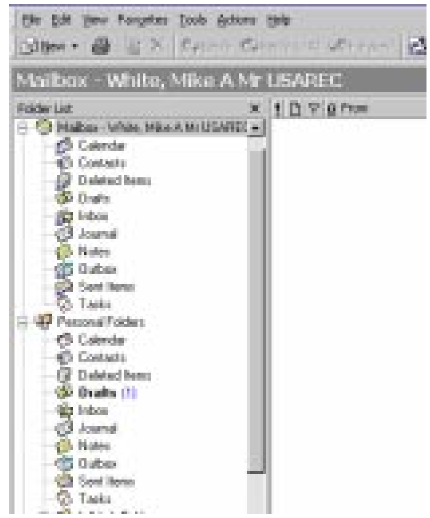


e. Make sure **Enable offline access** and **When online, synchronize all folders upon exiting** are checked and that **Microsoft Exchange Server** is checked under **Check for new mail on**. When finished, click **OK**.

✔ If your MS Outlook is already configured then there is nothing more that you need to do. Close MS Outlook and open the ARISS-RWS Leads-Reports application and try out the new features in your Contact History.

f. Now that this is completed the only thing that you have left to do is connect to your e-mail and synchronize your MS Outlook folders. Close your **MS Outlook** and logon to the network. Do you remember how to get connected and logon? If you need help review chapter 3.

g. Once you are connected, open **MS Outlook**. Your calendar should look something like this. It all depends on what view you have set. You can click on **View** and click on the different selections to format the look that you want. If you review the example, you can see that there is a folder called **Mailbox** and below is **Personal Folders**. Your name should be next to the **Mailbox** folder. This is where your mail is held until you connect and check it. Any new mail will now be automatically delivered to your **Personal Folders Inbox**. Since you are here now, take a few minutes and go through any mail that you have in your **Mailbox** folders. You may want to move some files to your **Personal Folders** or delete any old messages. There is a restriction on how big your Mailbox folder can be and by deleting old messages and moving the others to your **Personal Folders** you will never have a problem. Now that you are finished, close **MS Outlook** and disconnect from the network.

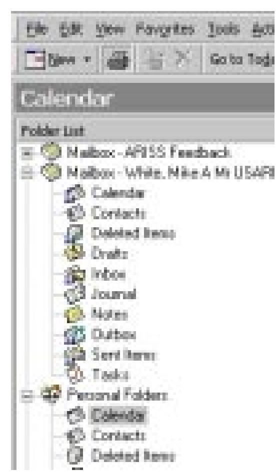


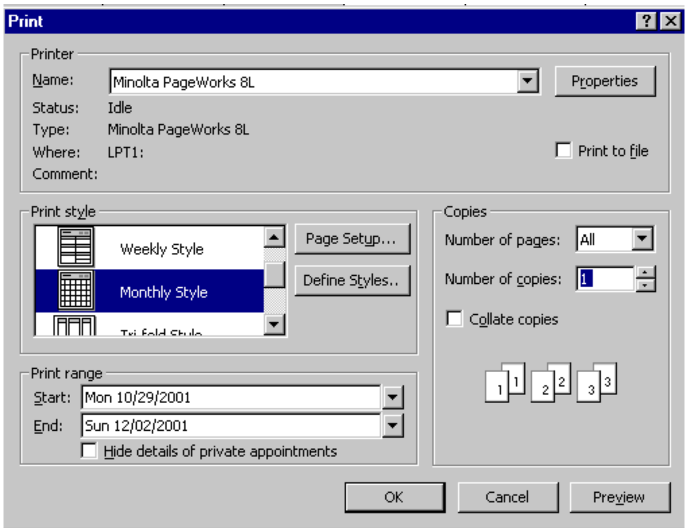
✔ Remember, once you have completed all your actions that require a connection to your ISP, you need to disconnect and disable your PERMIT/Client application and ISP connection. You only have so many hours per month, do not waste them being connected needlessly.

h. Now that your MS Outlook is set up correctly and your folders have been synchronized, all that is left is to open your ARISS-RWS Leads-Reports application and start saving those appointments that you are making. Review chapters 6, 13, 14, and 17 on how to save your Today Actions and Next Actions to your calendar in MS Outlook.

31-4. Printing your MS Outlook calendar.

a. Now that you are using your MS Outlook calendar there will be times when you need to make a copy for your files or your chain of command. To print the calendar is simple. Connect the printer to your laptop and open **MS Outlook**. Once MS Outlook opens, click on your **Calendar** under **Personal Folders**. Your calendar should appear. Depending on how you are viewing your calendar, you will see a **1 Day; 5 Work Week, 7 Week; or 1 Month** view. To print the calendar, click on the icon.





b. A separate screen will appear asking for you to identify the **Printer, Print style**, and **Print range**. Complete the necessary information and then click **OK**. Now you can give a copy to your SC, 1SG, or Rctg Co commander or just keep a copy for yourself

c. Once you are finished, close **MS Outlook** and go back out and prospect. This will be a great tool if you utilize it to its fullest potential. You will never miss an appointment and will have a quick reference to check on future appointments.

Glossary

AFQT
Armed Forces Qualification Test

AMO
Asset Management Option

ARISS
Army Recruiting Information Support System

ASVAB
Armed Services Vocational Aptitude Battery

CAST
Computerized Adaptive Screening Test

CLT
company leadership team

COI
centers of influence

DEP
Delayed Entry Program

DPR
daily performance review

DTP
Delayed Training Program

EPSQ
Electronic Personnel Security Questionnaire

FAZR
Force Structure Address and ZIP Code Realignment

GC
guidance counselor

HS
high school

html
hyper text markup language

ID
identification

IMS
information management specialist

ISP
Internet Service Provider

MEPS
Military Entrance Processing Station

MS
Microsoft

PCS
permanent change of station

PKI
Public Key Infrastructure

RA
Regular Army

Rctg Bde
recruiting brigade

Rctg Bn
recruiting battalion

Rctg Co
recruiting company

RS
recruiting station

RSID
recruiting station identification

RWS
recruiter workstation

SASVAB
Student Armed Services Vocational Aptitude Battery

SC
station commander

SOC
Service Oversight Center

SSN
social security number

TOS
Top of System

USAR
United States Army Reserve

USAREC
United States Army Recruiting Command

VIP
very important person

1SG
first sergeant